A Work Project, presented as part of the requirements for the Award of a Master's Degree in Management from the NOVA – School of Business & Economics.

Marketing Plan: How to Benefit from the European Population Ageing and Attract the Affluent Senior Segment to Choose Lisbon as a Tourism Destination?

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May 30, 2014

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1. Executive Summary

Nowadays in our everyday life, there is not a week that goes by where we do not hear/ read news regarding the ageing of population. This is a global phenomenon which is having an impact in both developed and developing countries and is mainly caused by modern life particularities. Although as consequence challenges are arising, on the other hand several opportunities are also being pointed out and the tourism sector is not immune to them. Thus, marketers will need new models to reach aging consumers[1].

In this sense, the aim of this work project was to study how the European population aging could have a beneficial impact in Lisbon's tourism sector scenario. Thus with the support of *Turismo de Portugal* (TP) and the *Associação do Turismo de Lisboa* (ATL), I developed a Marketing Plan for ATL (as if I were part of the Association), in order to suggest a strategy to attract the European senior segment to choose Lisbon as a tourism destination.

Hereupon, in order to develop the Marketing Plan several challenges were faced, on the one side because the objective is to promote a Destination (not a product or service) and also because ATL is a non-profit organization. On the other, although the population aging impact on the tourism sector has already been identified there are few relevant and reliable references about the senior segment's behavior, interests and motivations as well as statistics by age group in regard of tourism activities.

Accordingly, I followed a service-product approach and developed a 7P Marketing Mix where the focal point of the Marketing Strategy is the Promotion section where I developed a complete Integrated Marketing Communications Plan due to ATL's activity as promoter of Lisbon as a tourism destination. To that end, it was conducted a Marketing Research that included a secondary and a primary research

[1] 2011. *The Global Impact of an Aging World*. The Nielsen Company.

(please refer to Appendix 27). Thus, I conducted interviews to 15 tourism stakeholders (hotels and travel agencies) and 14 EU senior tourists (please refer to Appendix 27, Section 2.4) where the segment in study consisted in European people with 65 or more years that are probably already retired and who live a comfortable life, i.e., that have purchasing power (in exception to Portuguese citizens).

2. Company

ATL is a public interest private nonprofit organization that works as a public-private partnership, having a privileged revenue structure comprising 51% of own revenues[2]. ATL's mission is to promote Lisbon as a tourism destination and its activity is divided into two areas, *corporate* (to define the strategy of how, where and to whom the promotion plan is aimed) and *business* (to put the strategic plan in action and promote the region; to collect and analyze tourist information, providing reports and conclusions of tourism in the region; to collaborate in organizing and raising events for the City and Region of Lisbon)[3]. Further, ATL's Promotional Area coincides with the Promotional Area of "*Lisboa e Vale do Tejo*" (APL) defined by the Secretary of State for Tourism, which currently corresponds to Lisbon's Metropolitan Area and also to the Tourism Regions of *Oeste, Ribatejo, Templários and Leiria / Fátima*[4] (see Appendix 2).

3. Situation Analysis

3.1. Trend Analysis

Although population ageing is a global occurrence, this trend is taking higher expression in the European territory, having as main causes trends regarding mortality, life expectancy, and fertility (see Appendix 3 to understand these trends' implications in

[2] 2013. *Plano de Actividades e Orçamento para 2014*. ATL, Visitors and Convention Bureau.
[3] 2010. *Getting ready for the future? Present decisions future impacts*. Deloitte Consultores, S.A.
[4] http://www.visitlisboa.com/getdoc/2fdbbdfb-67db-4eaa-955e-7b3e6d778ff9/ATL-Estatutos.aspx (accessed on 21.05.14)

EU population aging). In effect, Western Europe is the region with the world's oldest population[5]. There is, however, a singularity in the EU population age structure once the older EU population is ageing due to the fact that the oldest age group is growing faster than any other population segment (see Appendix 4)[6]. Ergo, the age pyramid is going to gradually assume almost its reverse shape as the baby boomers are reaching and surpassing their 60s and, thus starting to climb up the pyramid leaving the younger groups narrowing it down (see Appendix 5).

The ETC (please refer to Appendix 1 for the abbreviations), identified the top ten trends impacting the tourism sector, and listed among them five which were related with demographic factors, where the top two are *ageing population* and *healthy older people*[7]. Further, according to a 2012 Eurostat report, during a period of economic crisis (between 2006 and 2011), the sector's *hero* was the 65 and over age group. According to a set of tourism indicators (see Appendix 6), and given the period, the senior segment was responsible for the only increase (10%) in the number of tourists; there was also an increase regarding the number of trips (29%) and overnight stays (23%). This segment was also responsible for 20% of all tourism spending within the European population having their tourism expenditure grow by 33%. In summary, the 65 and over age group was the only group that has not decreased in regard of the indicators, contrariwise it was the only age group showing growth[8].

Hereupon, it is clear that the European seniors have not only free time but also purchasing power and willingness to travel, which entails a significant potential for the tourism sector to explore and adapt to, thus the rapid growth of a healthier senior segment could represent a huge opportunity for the first movers in the sector towards

[5] 2011. *Special Report: The World's Oldest Populations*. Euromonitor International. http://blog.euromonitor.com/2011/09/special-report-the-worlds-oldest-populations.html (accesses on 30.04.14)
[6] 2012 Ageing Report – 2012. The 2012 Ageing Report: Economic and budgetary projections for the 27 EU Member States (2010-2060). European Commission.
[7] 2010. *Demographic Change and Tourism*. World Tourism Organization and European Travel Commission.
[8] Demunter, Christophe. 2012. *Industry, trade and services. Population and social conditions*. Eurostat.

this age group. This way, in regard of the marketing research, there are some characteristics about this segment's behavior that are important for the industry to pay attention to (please refer to Appendix 27, Section 1 – Topic 2; Section 2.1 – Topic 13).

Namely, they are likely to be more experienced travelers and are a very decided consumer group in terms of their wants and needs; they are not price sensitive but prefer to travel outside the peak season and school vacations.

Namely, they are likely to be more experienced travelers and are a very decided consumer group in terms of their wants and needs; they are not price sensitive, in effect are susceptible to spend more money than the younger age groups, but prefer to travel outside the peak season and school vacations to avoid the hustle; finally, they value the quality of the services as well as the way it is delivered (friendly and attentive people).

3.2. *Market Definition*

❖ *Market Size Captured*

Back in 2012, Portugal received approximately 7.7 million tourists where 5.8 million were from EU countries. Further, Lisbon was responsible for 29% of the country's total EU inbound tourism (see Appendix 7).

In terms of age groups' breakdown, since there is no data available, the number of European seniors that visited Lisbon in 2012 was extrapolated from the ATL's yearly Motivational Survey. Ergo, extrapolating the Survey respondents' demographic characteristics to the universe of inbound tourism in Lisbon, it is assumed that less than 8.2% (<222 thousand guests) of the total inbound tourists that visited Lisbon in 2012 were Europeans with ≥65 years (see Appendix 8).

Another interesting fact is that, between 2006 and 2012, and despite the fact that in 2009 the tourism sector suffered some struggles because of the economic crisis, since that period Lisbon's inbound tourism has been showing a sustained growth trend (see

Appendix 9). However, it is also possible to observe that although the European inbound market has been also increasing, this one has been increasing at a much slower pace. Thus, the European inbound market is losing expression especially from 2009 among the total inbound market (see Appendix 10), i.e., other foreign markets are increasing at a faster pace (please refer again to Appendix 9).

❖ *Market Size Opportunity*

According with the assumptions taken into account (see Appendix 11), it is projected that in 2020 there will be about 27.5 million of Europeans with ≥65 years actively participating in tourism, opposed to the 10.9 million estimated in 2012. Further, this means that in 2020 the European senior segment with an active participation on tourism will correspond to almost the triple of the Portuguese population today. Moreover, between 2012 and 2020, the European senior segment with an active participation on tourism will increase the equivalent of almost the double of the total Portuguese population today. Ergo, according to the very conservative assumptions taken into consideration, until 2020 every year there will be an increase of about 2.1 million of new European seniors being active participators in tourism (please refer to Appendix 11).

3.3. Competitor Analysis

According to ATL's Strategic Plan, Lisbon has as direct competitors, cities such as Amsterdam, Barcelona, Berlin, Madrid and Vienna[9]. However, regarding the senior segment travel behavior based on the interviews conducted for this study, there are other cities better fitted towards these consumers' preferences and motivations (please refer to Appendix 27, Section 2.1 – Topic 9 and 12; Section 2.2 – Topic 2 and 4). Thus, a benchmark analysis was conducted where the spectrum of potential competing cities

[9] 2010. *Getting ready for the future? Present decisions future impacts*. Deloitte Consultores, S.A.

was extended in order to better position Lisbon towards its competitors relatively to the senior tourism. Ergo, the benchmark was based on two parameters, city attractiveness/ diversity of experiences – includes several general characteristics which influence any tourist's decision-making process as well as the main motivations that influence the senior segment to choose Lisbon as destination – and affordability (please refer to Appendix 12 to understand the parameters' choice and the competitiveness measure criteria).

Hereupon, it is possible to observe that regarding the segment's motivations and expectations in terms of city attractiveness/ diversity of experiences, Prague, Barcelona and Berlin are Lisbon's top competitors (Appendix 12). On the other hand, Budapest, Prague and Madrid represent the most competitive cities in terms of affordability where Budapest occupies the leading position (Appendix 12). Therefore, regarding the city style and the affordability parameters as a whole Prague, Budapest, Barcelona, Berlin and Madrid emerge as Lisbon's direct competitive European cities for the senior segment where Prague occupies the top competitor position and Amsterdam and Vienna lose their competitive expression both in terms of city style and affordability (see Appendix 13).

3.4. SWOT Analysis

From a general perspective, Lisbon benefits from some positive aspects of Portugal's reputation such as the gastronomy and wine heritage and the good climate but on the other hand it could also be undermined by the fact that Portugal is strongly associated to being just a cheap sun & beach destination. Further, according to the primary research undertaken for this study, the main motivations that attract the baby boomers to visit the region of Lisbon are good Climate, the Cultural & Landscape Touring, Golf and Nature Tourism always complemented by Gastronomy & Wine curiosity (please refer to Appendix 27, Section 2.1 – Topic 5; Section 2.2 – Topic 2). With that being said, in this section I am going to further frame Lisbon's characteristics regarding its strenghts, weaknesses, opportunities and threats having in mind its main competitors and the segment that is being studied in this project, i.e., in relation to its key markets within a competitive framework[10]. Please refer to Appendix 14 for a detailed version of the SWOT analysis.

Strengths	Weaknesses
<u>General</u> • Unparalleled offering diversity of touristic products and activities within a short distance radius • Rich historical, cultural and nature patrimony • Airport in the city center proximity • Affluence and diversification of 4 and 5* hotels at affordable prices • Good weather during off-peak seasons • Safe and welcoming destination <u>Product/Service Oriented</u> • Gastronomy and wine heritage • World-class Golf courses • Tram's cultural touring circuits • Bird watching, hiking and trekking ATL: provenance of the majority of the funds as revenues opposed to tourism entities' donations	<u>General</u> • Country's association to just a Sun & Beach destination • Territorial dispersion of the main cultural sights of the city and poor guidance signaling to walk around the city • Poor accessibility to major cultural points of attraction • Poor public transportation network <u>Product/ Service Oriented</u> • Reduced notoriety of the region as a golf destination • Reduced usage of natural parks for touristic purposes • Lack of region gastronomic identity • Lack of wineries suitable for wine tasting activities ATL: the country's association as being a cheap destination does not "allow" the ReVPAR increase; lack of promoting the destination as the Region of Lisbon and not just as the City of Lisbon;
<u>General</u> • Europe's population aging ("baby boomer reign" – emergence of new consumption patterns and motivations) • Support the implementation of projects to emerge Lisbon as an accessible destination <u>Product/ Service Oriented</u> • Possibility to involve Golf tourism with other tourism products and stimulate cross-selling • Possibility to create themed itineraries to encourage longer stays decentralized form the city of Lisbon • Attract more events with international scope • Support and promote the new generation of Chefs in order to create a specific and unique gastronomic identity of the region ATL: to be a first mover as a tourism entity to focus in attracting the European seniors (the "dream" customer)	• Emerging of new competing destinations such as Budapest and Prague with more competitive prices and also strong cultural patrimony • Fierce competition among Mediterranean destinations in order to attract the same emerging markets • European financial crisis impact on pension systems • Lack of direct air connections with some European cities ATL: the fragile Portuguese economy allows smaller donation of funds by the government to tourism entities; weak promotion of the destination as a strong brand (top of mind)
Opportunities	Threats

Source: 2010. *Getting ready for the future? Present decisions future impacts*. Deloitte Consultores, S.A.

3.5. Collaborators

Since ATL is a non-profit association the relationships with its collaborators are extremely important. Thus, although ATL has a privileged revenue structure comprising 51% of own revenues[11], receiving financial support from public authorities (TP, ERTs and CML) and private sponsors continue to be fundamental for the development of its

[10] 2009. *Handbook on Tourism Destinations Branding*. World Tourism Organization and European Travel Commission.
[11] 2013. *Plano de Actividades e Orçamento para 2014*. ATL, Visitors and Convention Bureau.

activities. Furthermore, another relevant factor for ATL to be able to develop its main activity, are the partnerships with tour operators and airlines which work as facilitators and distribution channels of ATL's communication message. Thus, ATL has been observing a very positive impact resulting from *fam* trips[12], although it has some associated risks once it is not possible to control the invited perception of Lisbon in order to engage them on suggesting or writing about the destination as being "mandatory" to visit. Also about distribution channels, besides ATL's homepage and YouTube official page, ATL attends to various tourism trade fairs during the year to promote the destination and deliver the communication contents.

3.6. Key Success Factors

In terms of key success factors it is crucial for ATL to be able to build a strong branding towards the brand *region of Lisbon* within the segment's mind, i.e., to give the initial step in building brand preference and loyalty by generating stimulus-based brand recognition (seeing the product/brand stimulates the need for it) as well as memory-based brand recall (the customer has to recall the brand name, in order to remember the brand, when the need for the product arises)[13], which will increase the probability of the brand will be subsequently purchased. In that sense, service-product "delivery" plays a very important role, i.e., due to ATL's activity the way it makes the service-product available for consumption (distribution channels) is a critical aspect in regard of competition (like "location, location, location" in a retail business).

[12] trips sponsored by an entity with the intent to promote and advertise destinations/hotels by inviting representatives of various vehicles from the media and the tourist industry - airlines, travel agencies, journalists, bloggers

[13] *Hakala, Ulla & Johan Svensson & Zsuzsanna Vincze.* 2012. *Consumer-based brand equity and top-of-mind awareness: a cross-country analysis*. Journal of Product & Brand Management, Vol. 21 Iss: 6, pp.439 - 451

4. Marketing Strategy

4.1. Marketing Objectives

As the Work Project tittle says, the main objective of this Marketing Plan is to explore the rapid growth of the European population aging by capturing this “new” segment that could represent the “dream visitor” to any destination. Once according to the marketing research (both primary and secondary research), seniors mainly travel for leisure purposes (showing a higher average of nights spent as well as more trips per year), tend to travel outside the peak seasons and also spend more money during their trips (Appendix 27, Section 1; Section 2.1 – Topic 8 and 13; Section 2.2 – Topic 3).

Ergo, the goal is to capture 3.5% of the market size opportunity (section **Market Definition**) in the first year (2015), 4.5% in the second and 5% in the third, i.e., between 72 thousand and 103 thousand of EU senior guests annually (see Appendix 16), which will result in an increase of the total EU inbound market per year between 3.6% and 4.9% (see Appendix 15). Further, if this increment of guests occurs it will generate between 71 and 104 million euros along the three years-plan in expenditures (see Appendix 16). Thus, in order to achieve this goal, an integrated marketing communications plan will be further suggested as well as some partnerships with tourism entities. Furthermore, as mentioned above, because this is a segment that does longer trips and has a higher level of spending, it capture will also have a positive impact on the overall overnight stays as well as on the overall average daily spending. However, because there are no statistics available by age structure it is not possible to use these indicators as metrics to establish the marketing objectives. In addition, there are other secondary objectives derived from the potential capture of the segment in question such as combat seasonality and to recover the expression of the European market in the region of Lisbon.

4.2. Targeting

In order to define the target market it was taken into consideration parameters such geography, psychographs and demography. However, since the state of brand usage towards a brand is also an important factor when segmenting and targeting, I will start by following the Iacobucci's (2010) usage-based approach[14]. Please refer to Appendix 17 for the detailed target analysis.

Hereupon, once the objective is to attract a portion of the EU population who becomes retired and starts to travel just for leisure purposes it is going to be considered as main target the competitors' users (more specifically the OBLs and OBSs). Still, the brand users (more specifically the BLs), are also going to be targeted since these people are familiar with the leisure purpose traveling and have already visited Lisbon with that intention, thus the costumers' retention it is also going to be aimed. In addition, based on the marketing research, UK, Germany, France and Spain are Lisbon's strongest markets in terms of the senior visitors. However, although the UK and Spain markets are suffering a cutback, the UK and France are the markets with the highest percentage of over-65s population with the most affluent annual gross income (see Appendix 17, Table 4). On the other hand, Spain is the Western European country with the second lowest percentage of over-65s population with the most affluent annual gross income (see Appendix 17, Table 4). This way, the aim is to target the UK, Germany and France as primary target and Spain as a secondary. Further, within these markets the intent is to target the young-spirit seniors with ages between 60 and 75 years old and most importantly the ones who are affluent.

[14] Iacobucci, Dawn. 2001. *Kellogg on Marketing*. John Wiley & Sons, Inc. (chap. 2)

4.3. Positioning

After looking to Lisbon's positioning map (Appendix 13) and having in mind the marketing research insights, it stays clear that an effort has to be done in order to distance Lisbon of its competitors in terms of attributes regarding city attractiveness/ diversity of experiences so as to position Lisbon in the target's main place to visit position. This way, is recommended that a market focused strategy be implemented, i.e., to focus in a narrow market segment while communicating a wide range of services[15] (please refer to Appendix 18 for the Positioning Analysis).

Moving on to the positioning statement, it is suggested the following positioning statement "To the retired young-spirit and affluent seniors, which are OBSs (and FBSs and BLs), mainly from the UK, Germany and France (and Spain), who have all the free time in the world and seek to travel for longer periods and outside the peak seasons; The region of Lisbon is the ideal destination to enjoy leisure times; by offering an unparalleled diversity of cultural attractions, golf activities and rich gastronomic experiences always surrounded by breath taking natural landscapes that provide the perfect environment to relax or to be more adventurous while enjoying a mild climate; because of its natural beauty, strong cultural heritage and friendly people, characteristics continuously credited by international awards".

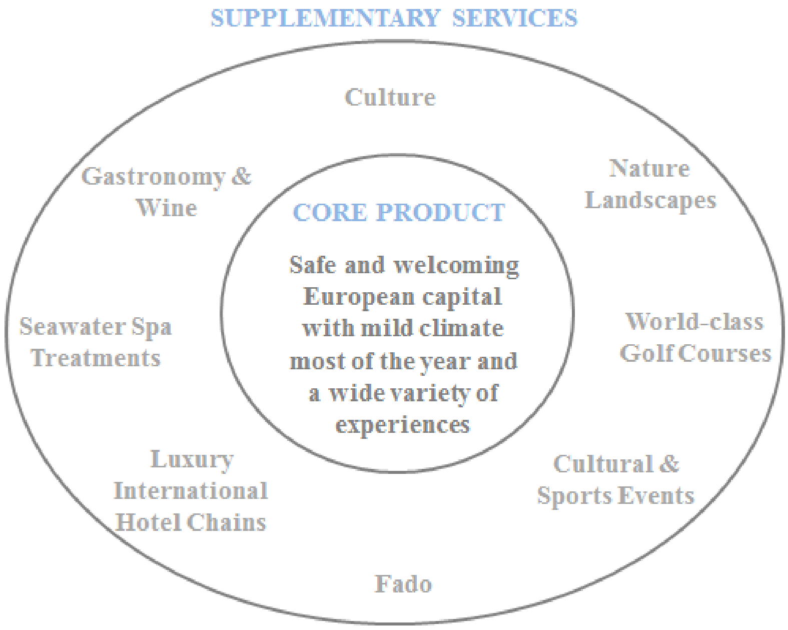
4.4. Marketing Mix

4.4.1. Service-Product

According to Lovelock & Wirtz, a service-product is represented by a service performance which is experienced rather than necessarily owned. Further, in order to better understand the nature of services it is helpful to differentiate the actual core product from the enhancing and facilitators supplementary components (core product

[15] Lovelock, Christopher H. & Jochen Wirtz, 2011. *Services Marketing, 7th ed*, Prentice Hall.

augment). Thus I followed the Lovelock & Wirtz service product concept design[16] (please refer to Appendix 19 for the description).



Source: Lovelock, Christopher H. & Jochen Wirtz, 2011. *Services Marketing, 7th ed,* Prentice Hall.

4.4.2. Price

Since ATL's activity consists in promoting the region of Lisbon as a tourism destination by communicating the region's attractive specificities for those who have an active role in tourism and also arouse curiosity in the minds of those who doesn't, in practice this means that ATL does not sell actual "*priceable*" products or services. With that being said, it is not applicable to develop any type of pricing model under these circumstances.

Nevertheless, in the **SWOT Analysis** section it was identified as a threat the fact that Lisbon is strongly associated as being a low cost destination. Thus, once the senior segment values high quality standards it might feel driven away to visit a destination that is associated with a scenario of low cost traveling. Having that in mind, it should be in ATL's agenda to make an effort to associate this low cost attribute to a high quality hotel service image once that on the other hand, the affordability attribute could also be

[16] Lovelock, Christopher H. & Jochen Wirtz, 2011. Services Marketing, 7th ed, Prentice Hall.

decisive for the segment to choose and repeat to visit a certain destination. However, the ability to communicate value is one of the most difficult achievements once effective value and price communications require deep understanding of customers' valuation. Thus, the "gold road" is to develop value-based messages to reflect key product characteristics such as nature of the benefits (psychological vs. monetary) and the type of good (search vs. experience)[17].

Hereupon, according with the marketing research, the targeted senior tourists are not price sensitive customers and are usually susceptible to buy upgrade promotions in the hotels (appendix 27, Section 2.1 – Topic 13). Thus, ATL should "educate" the hotel industry in regard of the senior tourists' profile in order for the industry to acknowledge the opportunity of increasing Lisbon's ReVPAR by "exploring" the off-peak senior tourists' purchasing power. To that end, it was recommended the development of a "best practices" manual as well as workshops directed to the sector's stakeholders in the section **People**.

4.4.3. Promotion

Given that the marketing plan is being developed for an entity whose activity consists in promoting a destination, this section will be the most relevant part of the Marketing Strategy. Therefore, it will be suggested the development of an Integrated Marketing Communications Plan in order to achieve the main objective to attract the EU senior segment to visit the region of Lisbon.

❖ Target Audience and Action Objectives

According to the targeted market already determined and also taking into consideration the Rossiter and Bellman's (2005) brand loyalty segmentation[18] (please

[17] Nagle, Thomas T. & John E. Hogan & Joseph Zale. 2011. *The Strategy and Tactics of Pricing, A Guide to Growing More Profitability*. 5th Edition. Prentice Hall
[18] Dahlen, Michael. Lange, Fredrik. Smith, Terry. 2010. *Marketing Communications: A Brand Narrative Approach* (Chap 11, p. 284)

refer to Appendix 20), the targeted audience must be the OBSs (primary target), FBSs and BLs (secondary target); from the UK, Germany, France (primary target) and Spain (secondary target); with ages between the 60s and 70 years old. In regard to the FBSs the intended action objective is for them to come back to visit Lisbon and possibly become BLs by continuing choosing to visit Lisbon (re-trial and repeat purchase). On the other hand, in regard of the OBSs, the intended action objective is for them to consider Lisbon as a possible destination for them to visit at least one time (trial and re-trial). Thus, in order to reach to them, the top three Lisbon's competitors (Prague, Barcelona and Budapest) will be also considered as target.

❖ Positioning and Communication Objectives

It was already observed that Lisbon occupies a strong position in relation to key competitors regarding the parameters of city attractiveness/ diversity of experiences and affordability (Appendix 13). This way, the intention is for Lisbon to occupy a privileged position ("best in class") towards its competitors (see Appendix 21) by differentially position the destination as a product-as-hero (product oriented) since the region of Lisbon gathers a set of attributes (safety, hospitality, climate, culture, nature, golf, gastronomy & wine, affordability) valued by the target customers, presenting visitors with benefits that competitors do not have the potential to strongly compete and differentiate. Thus, in terms of communication objectives and in regard of the targeted audience (OBSs, FBSs and BLs), travelling is a high involvement purchase that does not occurs too frequently thus it is essential to remind these category users of the category need and encourage them to consider Lisbon as a travel destination. Further, there is also the need of connecting the category need with the actual brand, thus it is necessary to build brand awareness recall prior to the purchase, i.e., to make the brand known in the eyes of consumers before they make a decision in terms of purchasing a category product. In regard of brand attitude, both the primary and secondary target may not even have heard about Lisbon much more about its offering. Thus, it is also necessary to create a positive brand attitude towards the region of Lisbon as being a perfect leisure destination in a way that possible consumers would feel lure enough to try it (positive purchase intention). This way, it is also important to incorporate purchase facilitation content in order for the target customer to get to know where the brand can be purchased[19].

❖ Creative Strategy and Execution

The creative tactics helps to connect the brand to the need (brand awareness) and also to persuade the target audience in recognizing the brand in question as the best alternative for satisfying that certain need (brand attitude)[20]. With that being said, as mentioned above, to successfully provoke the association between the brand and the category in the target audience's mind while luring them into choosing the region of Lisbon as being the best alternative for a leisure destination against other brands is an essential task and the goal is to do it during the time prior to the purchase (recall brand awareness).

Since upon the process of "purchasing" a destination to enjoy leisure time (motivation), customers can experience emotional benefits such as sensory gratification, intellectual stimulation and even social approval, resulting from the idea of coming to enjoy good experiences in a particular trip, it means that there is a transformational motivation behind this decision. In addition, there is also a high involvement of the customer in terms of search and conviction before the actual purchase. With that being

[19] Rossiter, John R. & Steven Bellman. 2005. *Marketing communications: Theory and application.* Pearson Prentice Hall Australia.
[20] Percy, Larry & Richard Rosenbaum-Elliott. 2012. *Strategic Advertising Management*. 4th Edition. Oxford University Press

said, the brand strategy must be primarily focused on the emotions portrayed in the various communication tools[21].

Thus, it is imperative that the targeted audience personally identifies with the communication in order to come across a level of identification with the actual service product that is being promoted. This way, and because the goal is to communicate to seniors, the focus should be on portraying experiences that evoke their motivations to choose a particular destination instead of focusing on images with senior presenters because aging is a delicate matter for some and also because the segment do not appreciate to feel segregated from the younger generations, they still consider themselves as being lively.

Relatively to the slogan, it must be aligned with the positioning that is intended for Lisbon to occupy within the category towards its competitors. Ergo, the proposed slogan is "Lisbon, the region that offers everything for everyone who has all the free time in the world". Moving on to key visuals, they must have in mind the marketing research conclusions about the main motivations/attributes that draws in the segment to visit the region of Lisbon – Safety, Hospitality, Cultural & Landscape Touring, Gastronomy & Wines, Nature Tourism and Golf. Thus, it must include visuals of mystic landscapes (cultural monuments, sea and nature), unique Portuguese traditions (Fado singers, mosaics, old trams and typical gastronomy) and also friendly people.

Finally, the creative tactics should include a video narrated by a mature sincere and trustworthy voice showing the diversity of attractions that the region of Lisbon offers (integrate the key visuals, the slogan and also *visitlisboa* website). In addition, in the *visitlisboa* website (in a new interactive platform that will be addressed in the **Process** section) should be available a downloadable leisure guidebook of the region suggesting the best hours (off the tourist traffic) to visit monuments and how to walk

[21] Percy, Larry & Richard Rosenbaum-Elliott. 2012. *Strategic Advertising Management*. 4th Edition. Oxford University Press

around (include maps of different areas of the region and public transport networks), accessibility info, where to enjoy typical and traditional gastronomy experiences and where to eat the best fish and seafood, and also include three options of suggested itineraries for a leisure 5 day trip in the region of Lisbon in different seasons of the year (integrate the key visuals and also the slogan). Finally, print out leaflets should portray functional-emotional attributes using the key visuals, video snapshots and always include the slogan and the *visitlisboa* website.

❖ Media Selection

According to the last survey of visitors' satisfaction conducted by the ATL's observatory, among the 183 respondents with ≥65 years in the Lisbon region, 42.6% said that opinions on social networks about the destination had no influencing role in their choice to visit Lisbon. On the other hand, and just looking for influencing elements related to communication distribution channels, tourist brochures and guidebooks consultation where the main elements that represented a very important role in the decision of these visitors to choose to come visit Lisbon (see Appendix 22). Hereupon, it is crucial that the media selection be focused and centered only on the target's preferred channels rather than dispersed through various channels in order to fight on several fronts and try to get faster to the final consumer. With that being said, it is recommended that two channels are used in parallel, digital advertising and print advertising. Thus, the video should be launched in the ATL's YouTube official page (Visit *Lisboa*) and also banner ads should pop up on relevant sites (homepage, travel search engines, airlines sites, booking sites and e-journals on the targeted markets) in order to advertise it. In addition, to increase the traffic of visits to the *visitlisboa* webpage, leaflets should be printed and handed out in the targeted markets; also the leaflets' materials (snapshots) should be printed out in journals and relevant travel and lifestyle magazines in the targeted markets (in exception of the competitor markets).

Media Budget & Split per Medium and Implementation & Campaign Tracking will be addressed in the following sections of Financials and Implementation & Control respectively (please refer to Appendix 23 to see the Creative Brief).

4.4.4. Place

In terms of service distribution strategies, the starting point is to answer four questions about *what*, *how*, *where* and *when*[22]. With that being said, in regard to the *what* question ATL distributes information and promotion flow, i.e., it distributes information and promotional materials relating to the service product offer with the intent of getting the customer's attention and desire towards experience the service product[23].

Hereupon, in addition to the media selection above determined, the marketing research also showed that the segment's majority still relies in tour operators to book its trips. Thus, despite the tendency of tourists increasingly resorting to the internet to book their trips, this segment still has a close relationship with tour operators. With that being said, and besides the media channels, it is recommended that tour operators and airlines are used as distribution channels. To that end, ATL should develop some partnerships with tour operators focused on incoming business in order to get access to those who are getting close to the retirement age and thus, are soon to be new users of the category of leisure travel. This way, tour operators would be intended to act as a propagating "platform" to spread the video and to promote the *visitlisboa* website in order to arouse the curiosity about Lisbon in the future visitors' minds. Further, ATL should also develop a partnership with TAP in order for leaflets to be handed out in flights that

[22] Lovelock, Christopher H. & Jochen Wirtz, 2011. Services Marketing, 7th ed, Prentice Hall.
[23] Lovelock, Christopher H. & Jochen Wirtz, 2011. Services Marketing, 7th ed, Prentice Hall.

depart from the targeted markets (UK, Germany, France, Spain) head on to the main competitors (Prague, Budapest, Barcelona, Berlin and Madrid) and some other selected routes in order to advertise the destination while linking it to the category (leisure) and also to generate visits to the *visitlisboa* webpage (and also to the YouTube video).

4.4.5. Process

The service process design consists in describing and prescribing the procedures to be followed in service delivery, i.e., how the service will be performed by both the customer and staff[24]. With that being said, in regard of ATL once its activity is to promote a region as a tourism destination (and not actually sell it), when it comes to the interaction between the "customers" and the "staff" this is almost a one-side relationship since ATL is the only one who "does the talk" opposed for example to a tour operator that has a high-level of interaction throughout the hole process of the service delivery.

Hereupon, once the marketing goal is to involve the service with the customers' processes to support value creation in those in a mutual beneficial way[25] it is suggested the development of an interactive platform in the *visitlisboa* webpage in order to promote a two-sided relationship between ATL and potential visitors. Thus, the idea is for this platform to be exclusively dedicated to leisure where the visitors could assess information about events calendar, climate (best months to visit the region), must see attractions and activities (monuments, architecture, golf, spas, landscapes, gastronomy & wine), accessibility (monuments, restaurants, public transport equipped with proper infrastructures to receive people with reduced mobility) and also create personalized itineraries by inserting their preferences/needs, trip days and time of the year (available in English, French, German and Spanish). The interactive platform will also include the

[24] Kotler, Philip Kotler, Kevin Lane Keller, Mairead Brady, Malcolm Goodman , Torben Hansen. 2012. *Marketing Management*. 2nd European edition. Pearson Education Limited, England. (Chap. 18)
[25] Kotler, Philip Kotler, Kevin Lane Keller, Mairead Brady, Malcolm Goodman , Torben Hansen. 2012. *Marketing Management*. 2nd European edition. Pearson Education Limited, England. (Chap. 18)

leisure guidebook available for download (please refer to section **Promotion**). This way, ATL could have access of potential visitors' behavior in terms of what are their interests by monitoring its "navigation path" through the platform. On the other hand, the platform visitors' would also feel closer to ATL once they would get a sense of a unique and customized experience.

4.4.6. People

When in the presence of services where there is no clue from tangible products, the service personnel represents a particularly important role[26]. As mentioned above, there is a quite restricted interaction between "customers" and ATL's personnel, i.e., although ATL sells the region of Lisbon as a service product, tourism players are the ones who actually deliver the services to customers.

Hereupon, in order to prepare the sector to be able to better welcome and handle successfully moments of truth (interactions when customers invest a high amount of emotional energy in the outcome[27]) towards the segment in question, ATL should develop several workshops with the intent to focus on the opportunity of capturing the segment and to educate the tourism players about the segment's behavior, interests and needs by also distributing "best practices" manuals. In addition, a newsletter targeting tourism players (mainly hotels and tour operators) should be developed in order to divulge international tourism reports released about the segment in question, specific data about the segment collected from the annual satisfaction surveys conducted by the ATL's observatory and also relevant information such as sports, art and gastronomy events, improvement of accessibility to museums/ monuments and promotional

[26] Kotler, Philip Kotler, Kevin Lane Keller, Mairead Brady, Malcolm Goodman , Torben Hansen. 2012. *Marketing Management*. 2nd European edition. Pearson Education Limited, England. (Chap. 18)
[27] Kotler, Philip Kotler, Kevin Lane Keller, Mairead Brady, Malcolm Goodman , Torben Hansen. 2012. *Marketing Management*. 2nd European edition. Pearson Education Limited, England. (Chap. 18)

materials in order to help the players to better customize the services according to the segments interests and needs.

4.4.7. Physical Evidence

Physical evidence includes the surroundings and any tangible item received during the process which will influence both the customer's and the service provider's behavior and experience of the service[28]. This way, in terms of ATL's promotion of the region of Lisbon as physical evidences ATL can only manipulate and control the promotional materials. Further, when it comes to the physical environment it can serve as a differentiator in targeting the intended market segment, positioning the service and passing across a distinctive image in regard of competitors[29]. With that being said, this is the reason why the **Promotion** section is the "hero" of this marketing plan and why it was so important to conduct a marketing research (qualitative primary research and qualitative and quantitative secondary research) in order to glove fit a communications plan towards the targeted audience aiming to communicate messages that give a clear sense of the targeted audience's benefits and also to come up with a strong slogan and positioning statement that portray a clear message of differentiation and uniqueness which could reveal itself a privileged position of the destination in relation to its competitors. Hereupon, in order to evidence a superior service quality ATL should include in the interactive platform a well-structured and user friendly section ("Awards&Press") including a list of all the awards won in regard of the segment's motivations (for example Europe's Leading City Break Destination[30] and Europe's Leading Golf Destination[31]) as well as press releases about the destination that could relate with the targeted audience and also monthly posts made by a sector's stakeholder

[28] Kotler, Philip Kotler, Kevin Lane Keller, Mairead Brady, Malcolm Goodman , Torben Hansen. 2012. *Marketing Management*. 2nd European edition. Pearson Education Limited, England. (Chap. 18)
[29] Kotler, Philip Kotler, Kevin Lane Keller, Mairead Brady, Malcolm Goodman , Torben Hansen. 2012. *Marketing Management*. 2nd European edition. Pearson Education Limited, England. (Chap. 18)
[30] http://www.worldtravelawards.com/award-europes-leading-city-break-destination-2013 (accessed on May 14, 2014)
[31] http://www.worldtravelawards.com/award-europes-leading-golf-destination-2013 (accessed on May 14, 2014)

from three different areas of the region of Lisbon speaking about its distinctive products' offering or some products' novelties.

5. Financials

As mentioned earlier, since the ATL is a nonprofit entity that promotes the region of Lisbon as a tourism destination means that it only allocates funds for promotional activities without getting any direct return on the investments made in promotion. Thus, on this section it will be assessed the total budget that should be allocated for this Marketing Plan including the Media Budget & Split per Medium that should be allocate to the suggested integrated marketing communications (IMC) plan. Please refer to Appendix 24 for the financials.

6. Implementation and Control

The final section of the Marketing Plan will address the implementation timings of the Plan as well as the control timings and tools / activities once it is crucial to assess whether the Plan is achieving the Marketing Objectives or if there is the necessity of making contingency adjustments.

Although the Plan was developed for the next three years, some measures need to start being worked in the present year. Thus, ATL should start addressing tour operators and airlines at the end of this year in order to establish possible partnerships and thereby align how the region of Lisbon should be communicated and promoted as a service product towards the targeted markets. Furthermore, it is also prudent to begin contacting communication agencies as well as programmers so that both the video and the interactive platform can be launched at the beginning of the first year. In addition, the contents of the guidebook as well as the best practices manual should also be started to be worked on right this year (please refer to Appendix 25).

Regarding the communications plan, according to the marketing research was possible to observe in which times of the year the segment in study makes its trips to visit the region of Lisbon and also its behavior in terms of the antecedence on the trip planning and booking (please refer to Appendix 27, Section 2.1 – Topic 2 and 8; Section 2.2 – Topic 3). Ergo, the proposed strategy is to invest in banners and video-sharing platform in the common preceding months of the segment's usual trips. To invest in the distribution of leaflets on airplanes during the months in which the segment travels more. Finally, to invest in journal and magazine ads during the months when the segment travels the least in order to remind the segment about the category and so let it curious and with the desire of planning a visit to the destination (sensory gratification). In addition, once the stakeholders' posts in the interactive platform are going to the released monthly, ATL will have to start to approach several stakeholders at the beginning of every month in order to choose the best three "candidates" according to which areas need the most to be promoted or to support events or product novelties.

In regard of the investment in commercialization and sales, in the first year two workshops should be held by the ATL in order to educate and train the stakeholders to better adjust to the segment's behavior; in the two precedent years only one workshop at the end of each year should be held in order to get some feedback from the stakeholders about the segment and also to renew the briefings done in the first year. Further, the newsletter should be worked on all year around whenever there is relevant information to share with the stakeholders (please refer to Appendix 26 for a full overview of the implementation cycle map).

Moving on to control, the marketing objective should be monitored thru quarterly data collected from the tour operators as well as airlines regarding the number of guests' entries by country of residence and age group (within the target). Further, the workshops could also be a pertinent occasion to pass on a survey among the stakeholders in order to collect relevant qualitative information. In addition, at the end of each year there should be done a full review which should result in a detailed report with information such as the monthly number of guests' entries by country of residence and age group (within the target), seasonality of visits and number of overnight stays. Besides that, in regard of the objective to recover the expression of the European market in the region of Lisbon, this parameter could by assessed by observing the quarterly and yearly Guests statistics that INE provides. However, because INE does not do fragmentation of tourist arrivals by age group even if it is observed a positive evolution of the expression of the European market, this indicator cannot be considered in isolation as a result of the implemented actions to attract the targeted markets.

Furthermore, in regard of the communications campaign control and in order to measure its effectiveness there are two variables that can be measured, the reach of the campaign, i.e., how many people is it reaching, and also its performance in terms of how is the audience interacting and acting about it. Therefore, the number of leaflets and video and interactive platform shares should be tracked among the tour operators as well as the airlines. In complement, the number of webpage visits, banner ads' clicks, YouTube views and comments should also be tracked to observe the audiences' reactions. In addition, in order to understand how brand attitude is evolving in the targeted audience's mind, customer surveys should be made to the issuing and competitor's markets.

7. Appendixes

APPENDIX 1 – ABBREVIATIONS

EU – European Union

EU-27 – European Union of 27 Member States

INE – *Instituto Nacional de Estatísticas*

ATL – *Associação do Turismo de Lisboa*

APL – Área Promocional de "Lisboa e Vale do Tejo"

TP – *Turismo de Portugal*

CML – *Câmara Municipal de Lisboa*

ERTs – *Entidades Regionais de Turismo*

PENT – *Planto Estratégico Nacional do Turismo*

ETC – European Travel Commission

UNTWO – World Tourism Organization

ITB – International Travel Bureau

UK – United Kingdom

ReVPAR - Revenue Per Available Room

DMC – Destination Management Company

BLs – Brand Loyals

OBLs – Other Brand Loyals

OBSs – Other Brand Switchers

FBSs – Favorable Brand Switchers

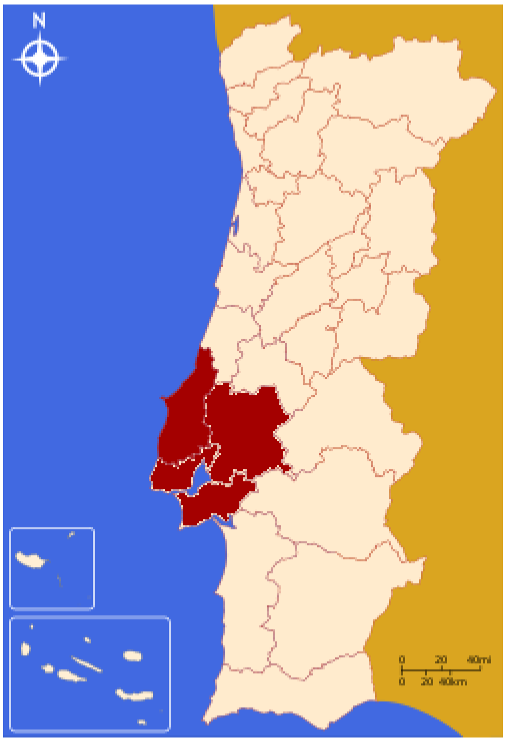
NCUs – New Category Users

IVA – *Imposto sobre o Valor Acrescentado*

CM – Contribution Margin

ROI – Return on Investment

APPENDIX 2 - *Área Promocional de "Lisboa e Vale do Tejo"*



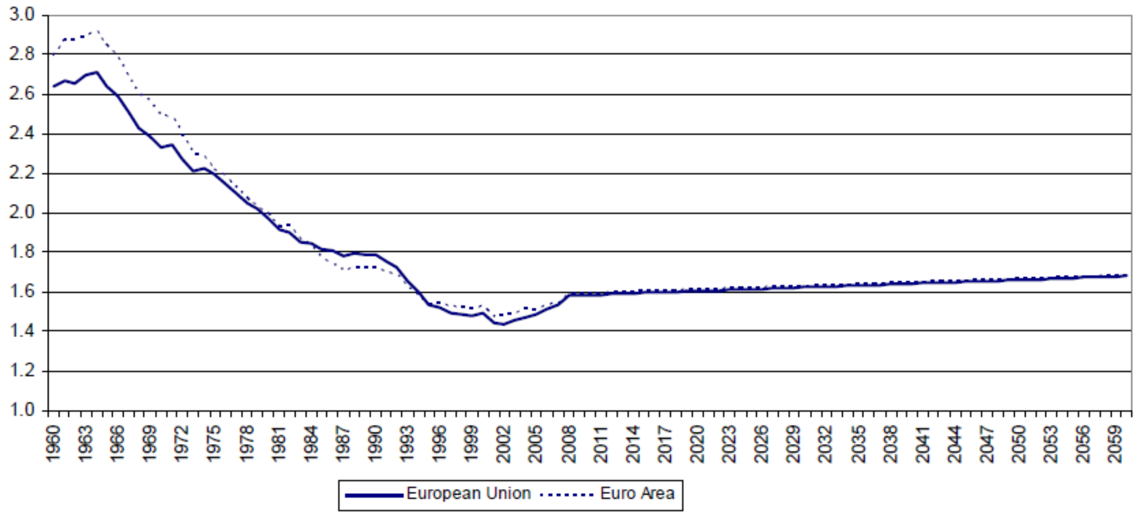
APPENDIX 3 – MAIN INFLUENCING FACTORS OF THE EUROPEAN POPULATION AGING

❖ Fertility

Although fertility is slightly increasing, most of this increase is being observed in countries that have been pointed out by its extremely low fertility rates (<1.3 children per woman). The reality is that the EU-27 population growth has been suffering from a slowdown and this is due to low fertility. Although it is projected that the EU total fertility rate is going to grow from 1.59 in 2010 to 1.71 by 2060[32], this growth still does not make up in comparison to the fertility peak registered after the World War II, i.e., the percentage of births will be much smaller than the percentage of baby boomers that are ageing into seniority (see Graph 1).

[32] 2012. The 2012 Ageing Report: Economic and budgetary projections for the 27 EU Member States (2010-2060). European Commission.

Graph 1 – Total Fertility Rates, 1960-2060

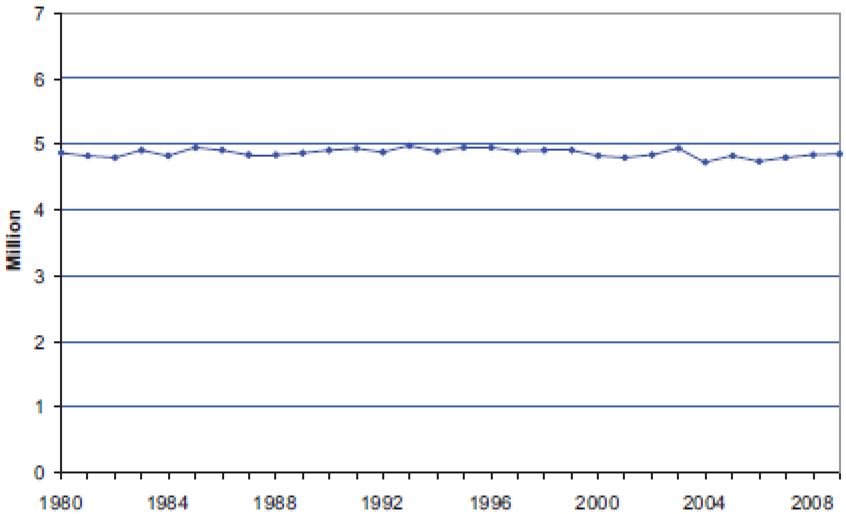


Source: 2011. *Demography report 2010: Older, more numerous and diverse Europeans*. European Commission.

❖ Mortality and Life Expectancy

Over the past five decades we have assisted a 10-year increase in life expectancy at birth for both men and women in the EU-27 and consequently, we have also been able to observe a gradual mortality reduction (see Graph 2). The improvement of environmental conditions and health systems across Europe are responsible for the fact that this tendency has been observed for longer in Europe than in the rest of the world, i.e., EU-27 is the world leader for life expectancy[33].

Graph 2 – Number of Deaths in EU-27, 1980-2009



Source: 2011. *Demography report 2010: Older, more numerous and diverse Europeans*. European Commission.

[33] 2011. *Demography report 2010: Older, more numerous and diverse Europeans*. European Commission.

Nonetheless, despite of being the life expectancy world's leader this position is not transversal to all Member States, i.e., there are differences in terms of this indicator among these countries and within those we can also observe differences in terms of gender (although women live longer in all Member States). Thus, factors such as levels of education and standards of living could be the explanation for the observation of such heterogeneous behaviors (see Table 1).

Table 1 – Life Expectancy by Gender and Educational Attainment (selected ages), 2008

	Educational attainment	Men					Women				
		Age 30	Age 40	Age 50	Age 60	Age 70	Age 30	Age 40	Age 50	Age 60	Age 70
BG	Total	41.6	32.3	23.8	16.6	10.7	48.3	38.7	29.4	20.8	12.9
	Low	33.9	25.9	19.6	14.7	10.3	44.1	35.4	27.4	19.7	12.5
	Medium	44.5	34.9	25.9	18.0	11.1	49.7	40.0	30.5	21.6	13.3
	High	47.4	37.6	28.0	19.2	11.6	51.4	41.5	31.8	22.6	13.8
CZ	Total	45.0	35.5	26.5	18.7	12.1	51.0	41.3	31.8	23.0	14.9
	Low	38.0	29.5	21.8	15.5	10.9	51.4	42.0	32.7	23.7	15.2
	Medium	44.8	35.3	26.3	18.6	12.2	50.3	40.5	31.1	22.4	14.6
	High	51.4	41.5	31.8	22.4	13.5	54.5	44.5	34.7	25.1	15.8
DK	Total	47.5	38.0	28.8	20.4	13.1	51.5	41.8	32.4	23.6	15.6
	Low	44.0	35.3	26.8	19.3	12.6	49.0	39.8	30.9	22.7	15.3
	Medium	47.8	38.1	28.9	20.5	13.2	52.2	42.5	33.0	24.1	15.8
	High	50.4	40.6	31.0	22.0	13.9	53.6	43.8	34.1	24.9	16.3
EE	Total	40.5	31.5	23.2	16.4	11.0	50.4	40.8	31.5	22.9	15.0
	Low	30.7	23.3	17.0	13.0	9.3	45.0	35.8	28.3	21.4	14.5
	Medium	41.2	32.1	24.0	17.2	11.4	49.5	39.9	30.8	22.7	15.0
	High	47.7	38.1	28.7	20.0	12.4	54.0	44.1	34.3	24.7	15.7
IT	Total	49.7	40.1	30.8	22.0	14.2	54.8	45.0	35.4	26.2	17.6
	Low	48.0	38.6	29.7	21.4	14.1	54.0	44.3	34.9	26.0	17.5
	Medium	52.9	43.1	33.4	24.1	15.2	56.6	46.8	37.0	27.5	18.2
	High	53.1	43.2	33.5	24.1	15.1	56.7	46.8	37.0	27.4	18.1
HU	Total	41.1	31.7	23.4	16.8	11.2	49.0	39.3	30.3	22.0	14.4
	Low	34.0	25.2	18.4	13.7	10.8	46.3	37.0	28.7	21.2	14.3
	Medium	43.7	34.2	25.8	19.2	12.0	50.6	40.9	31.7	23.2	14.9
	High	47.1	37.3	28.0	19.6	12.3	51.1	41.2	31.7	22.7	14.4
MT	Total	48.5	39.0	29.7	20.9	13.4	53.1	43.3	33.6	24.4	16.0
	Low	48.0	38.7	29.5	20.8	13.3	53.0	43.2	33.5	24.3	15.9
	Medium	49.4	39.5	29.9	21.8	13.8	53.5	43.5	33.6	25.1	16.3
	High	51.0	41.2	31.6	21.9	13.8	54.6	44.6	35.2	25.3	16.3
PL	Total	42.6	33.4	25.1	17.9	11.9	50.8	41.1	31.8	23.2	15.2
	Low	36.5	28.6	22.3	16.7	11.4	48.6	39.3	31.0	22.8	15.1
	Medium	43.1	33.9	25.3	18.0	12.0	51.0	41.3	31.9	23.3	15.4
	High	48.7	38.9	29.5	20.8	13.0	53.2	43.3	33.7	24.4	15.8
RO	Total	41.6	32.4	24.0	17.1	11.2	48.6	38.9	29.7	21.1	13.4
	Low	35.3	26.9	20.6	15.9	10.8	46.4	37.1	28.7	20.8	13.3
	Medium	44.5	35.1	26.5	19.0	12.0	50.7	40.9	31.5	22.5	14.0
	High	43.4	33.7	24.8	17.1	11.0	48.7	39.0	29.7	21.0	13.4
SI	Total	46.5	37.0	28.0	20.1	12.9	53.1	43.3	33.8	24.8	16.4
	Low	42.7	33.6	25.3	18.2	12.3	51.8	42.3	33.0	24.4	16.2
	Medium	47.0	37.4	28.4	20.4	13.1	53.6	43.8	34.2	25.2	16.6
	High	50.0	40.2	30.7	21.9	13.7	54.3	44.5	34.8	25.6	16.7
FI	Total	47.6	38.2	29.2	21.2	14.0	53.9	44.1	34.6	25.7	17.2
	Low	44.8	36.2	27.9	20.5	13.8	51.8	42.5	33.7	25.3	17.1
	Medium	47.5	38.0	29.2	21.2	14.0	54.0	44.3	34.8	25.8	17.3
	High	50.8	41.1	31.5	22.7	14.5	55.2	45.3	35.6	26.3	17.4
SE	Total	50.0	40.4	30.9	22.1	14.3	53.8	44.0	34.4	25.3	16.9
	Low	48.1	38.9	29.9	21.5	14.1	52.2	42.6	33.4	24.7	16.7
	Medium	50.1	40.4	31.0	22.2	14.3	53.8	44.0	34.4	25.3	16.9
	High	51.9	42.1	32.4	23.1	14.6	55.0	45.1	35.5	26.1	17.2

Source: 2011. *Demography report 2010: Older, more numerous and diverse Europeans*. European Commission.

Besides the fact that the gains in life expectancy represent a major reason for the population aging, another very important factor in this project's context is the fact that people are living longer healthy lives (healthy life expectancy), thus people live more years after retirement without long-term or limiting illnesses. In effect, it is in the over-60s age group for both men and women where we can observe higher gains in life expectancy (see Table 2).

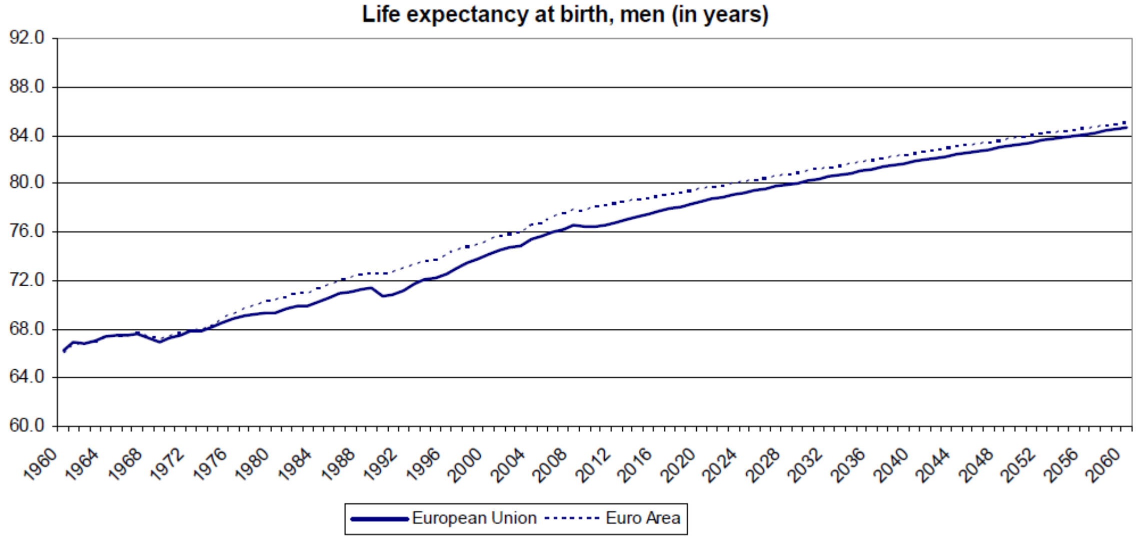
Table 2 - Distribution of Gains in Life Expectancy by Age Group and Gender, 1993-2009

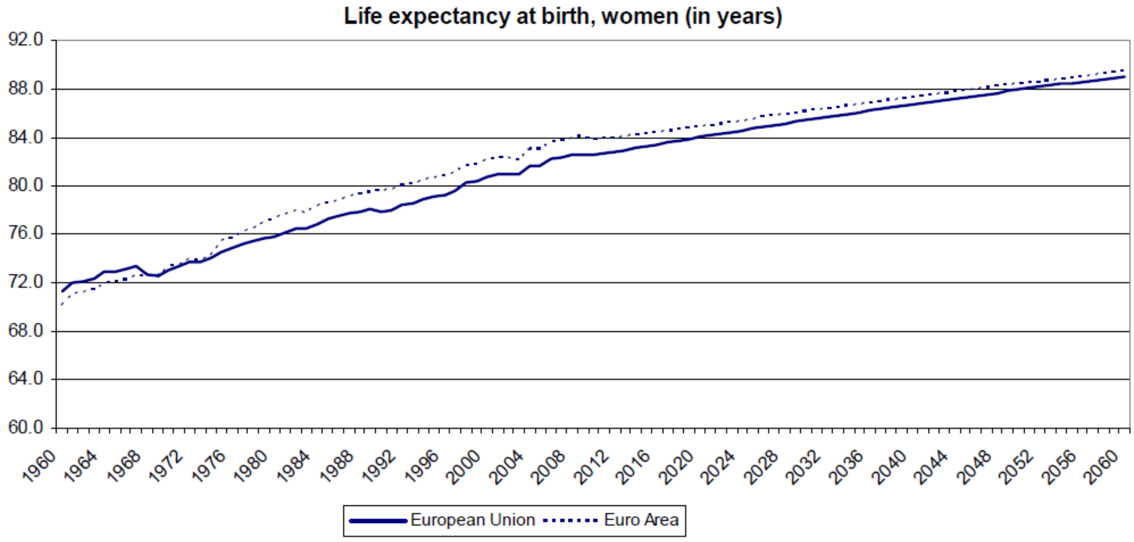
men	Age											Increase (in years) in life expectancy at birth
	0	1 - 9	10 - 19	20 - 29	30 - 39	40 - 49	50 - 59	60 - 69	70 - 79	≥80	Total	
EU-27	4.8	2.0	2.7	4.9	5.1	11.7	6.7	18.9	25.5	17.7	100%	1.9
BE	8.8	1.7	2.7	5.3	4.4	7.8	6.6	20.4	28.0	14.3	100%	4.1
BG	18.3	7.9	3.8	7.1	13.9	17.3	8.6	3.0	12.5	7.6	100%	2.5
CZ	10.0	2.6	2.6	4.2	5.6	11.2	16.8	20.4	20.2	6.3	100%	4.9
DK	5.2	2.2	2.7	2.8	8.0	9.0	10.0	25.9	25.2	9.0	100%	4.3
DE	4.1	1.6	2.9	4.9	7.0	8.9	11.6	23.0	23.0	13.1	100%	5.0
EE	11.4	4.0	5.9	9.3	12.3	18.3	15.3	13.8	6.1	3.5	100%	7.5
IE	4.5	1.7	1.1	0.5	-1.6	2.9	14.9	30.4	32.6	13.0	100%	4.8
EL	14.8	1.5	1.5	1.3	2.4	3.9	4.5	25.9	23.8	20.4	100%	2.9
ES	6.4	2.2	3.0	11.0	12.8	7.8	8.7	16.3	19.5	12.4	100%	4.6
FR	6.1	2.0	3.2	8.1	10.5	9.4	8.7	19.6	18.8	13.6	100%	4.5
IT	6.5	2.4	2.9	5.6	7.1	5.9	12.9	24.7	22.3	9.7	100%	4.6
CY	8.6	4.6	7.1	-0.5	0.9	7.8	11.1	25.7	30.3	4.2	100%	3.9
LV	6.5	5.1	1.8	12.3	16.2	21.0	18.3	10.1	4.7	4.0	100%	3.5
LT	16.7	5.0	3.3	11.5	13.8	23.5	14.9	3.8	6.5	0.9	100%	4.4
LU	6.9	2.5	4.2	9.9	7.6	7.3	9.3	21.4	24.4	6.4	100%	5.9
HU	10.3	2.3	1.7	5.8	17.5	21.3	13.9	13.5	9.2	4.5	100%	5.6
MT	22.9	4.0	5.8	1.3	1.5	8.1	12.8	21.2	15.2	7.2	100%	3.1
NL	5.0	1.6	2.6	2.8	4.1	6.1	11.7	25.3	27.6	13.0	100%	4.7
AT	5.4	1.5	3.8	6.4	6.0	8.6	11.8	21.6	22.6	12.2	100%	4.8
PL	19.0	2.7	2.0	3.8	7.1	11.1	13.7	16.1	15.6	7.0	100%	4.4
PT	8.2	4.9	5.8	11.2	8.7	4.1	9.3	18.9	18.8	10.1	100%	5.5
RO	25.6	10.9	2.6	5.7	12.2	12.4	8.4	7.4	8.8	5.9	100%	3.9
SI	6.8	0.9	2.9	7.1	8.8	10.9	17.3	21.9	15.7	7.8	100%	6.5
SK	10.7	1.3	2.4	4.1	8.0	16.3	18.5	19.9	14.0	4.8	100%	3.6
FI	4.0	2.4	1.2	3.0	4.7	8.4	12.0	22.5	28.7	13.1	100%	4.5
SE	5.6	0.9	1.4	0.9	4.9	7.6	12.3	23.3	28.3	14.7	100%	3.9
women	**Age**											**Increase (in years) in life expectancy at birth**
	0	1 - 9	10 - 19	20 - 29	30 - 39	40 - 49	50 - 59	60 - 69	70 - 79	≥80	Total	
EU-27	5.6	1.8	1.6	2.2	3.1	6.7	4.9	12.4	27.9	33.9	100%	1.5
BE	9.4	1.8	1.7	3.3	2.3	5.4	3.2	13.5	28.8	30.7	100%	2.7
BG	15.2	7.0	2.8	4.4	3.5	1.3	4.4	19.0	25.6	16.8	100%	2.3
CZ	9.2	1.9	1.5	2.2	3.2	5.9	9.2	20.5	30.0	16.5	100%	4.0
DK	4.7	1.8	1.5	1.4	4.4	9.2	14.8	25.6	20.8	15.8	100%	3.3
DE	4.9	1.9	1.8	2.2	4.6	7.2	7.2	17.7	30.9	21.7	100%	3.4
EE	12.4	3.9	3.5	1.8	4.2	9.3	11.6	17.9	20.5	14.9	100%	6.2
IE	5.1	0.9	0.1	-0.2	0.7	2.7	9.1	22.4	31.1	28.0	100%	4.4
EL	13.3	1.3	1.9	0.8	1.0	3.8	5.2	23.9	36.1	12.9	100%	2.9
ES	6.8	2.7	1.6	3.9	4.6	2.7	5.0	14.5	27.3	30.8	100%	3.6
FR	5.5	2.0	2.6	4.6	4.5	3.8	4.0	11.7	22.4	38.9	100%	3.2
IT	7.6	3.3	1.5	3.1	4.3	4.2	7.1	15.1	27.3	26.5	100%	3.5
CY	11.9	0.7	1.8	4.1	0.6	1.7	4.7	18.5	36.3	19.8	100%	3.8
LV	6.2	7.8	5.1	0.9	5.5	6.9	15.2	12.8	18.6	21.0	100%	2.0
LT	18.4	5.9	2.1	3.7	4.1	9.6	11.3	13.3	20.6	11.0	100%	3.7
LU	4.0	2.0	4.7	4.9	5.0	8.0	6.7	10.8	26.4	27.5	100%	3.7
HU	10.7	2.2	1.3	3.1	10.5	11.5	8.1	16.6	20.0	16.0	100%	4.4
MT	3.0	-1.8	0.4	-3.9	-1.1	4.4	7.8	17.8	43.4	29.9	100%	3.2
NL	5.3	2.5	1.3	2.6	4.6	4.9	5.3	15.4	26.9	31.2	100%	2.8
AT	4.7	1.6	2.0	2.3	3.6	7.8	8.2	14.1	28.3	27.2	100%	3.7
PL	16.9	2.1	0.8	1.4	3.4	6.4	5.2	16.2	28.1	19.7	100%	4.3
PT	8.1	4.2	2.6	3.5	3.4	4.8	8.8	15.2	28.0	21.3	100%	4.4
RO	21.6	8.3	1.2	2.7	6.7	6.4	7.6	13.9	19.9	11.8	100%	4.0
SI	4.8	1.5	1.3	3.1	4.8	7.1	9.5	19.1	26.3	22.5	100%	5.0
SK	11.3	2.5	1.1	2.5	4.7	5.1	10.9	23.6	28.2	10.2	100%	2.8
FI	2.4	1.2	0.2	0.8	2.8	3.3	4.0	14.8	36.0	34.6	100%	3.9
SE	5.4	1.5	1.5	2.5	4.3	6.1	8.0	14.7	26.1	29.9	100%	2.6

Source: 2011. *Demography report 2010: Older, more numerous and diverse Europeans*. European Commission.

With that being said, in terms of projections it is expected that in the EU, between the period of 2008 till 2060, life expectancy will increase by 7.9 years for males (from 76.8 to 84.6 years) and 6.5 years for females (from 82.5 to 89.1 years) (see Graph 3)

Graph 3 – EU Life Expectancy at Birth by Gender, 1960-2060

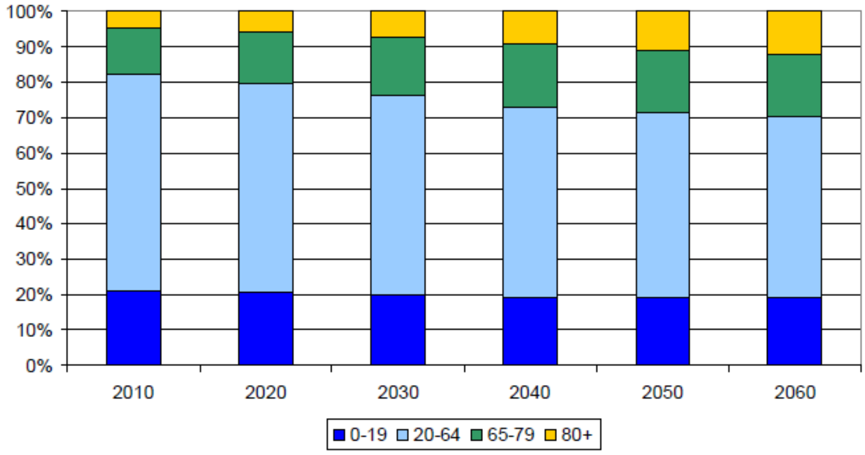




Source: 2012. The 2012 Ageing Report: Economic and budgetary projections for the 27 EU Member States (2010-2060). European Commission.

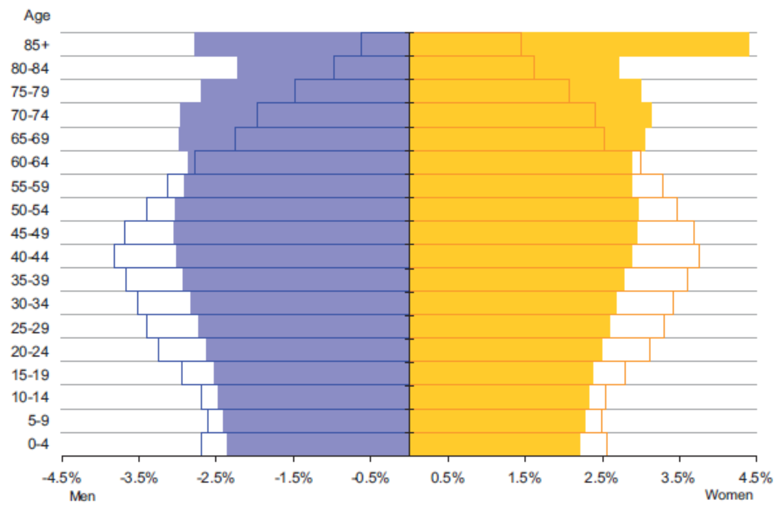
Furthermore, in terms of life expectancy at the age of 65 it is expected a 5.2 years increase for males (from 17.2 to 22.4 years) and 4.9 years for females (from 20.7 to 25.6 years). Thus, it is possible to observe a 4.5 years life expectancy at birth gender difference and a 3.2 years at the age of 65, which entails a life expectancy convergence between genders[34].

APPENDIX 4 – PROJECTION OF CHANGES IN THE AGE STRUCTURE OF EU-27 POPULATION



Source: 2012. The 2012 Ageing Report: Economic and budgetary projections for the 27 EU Member States (2010-2060). European Commission.

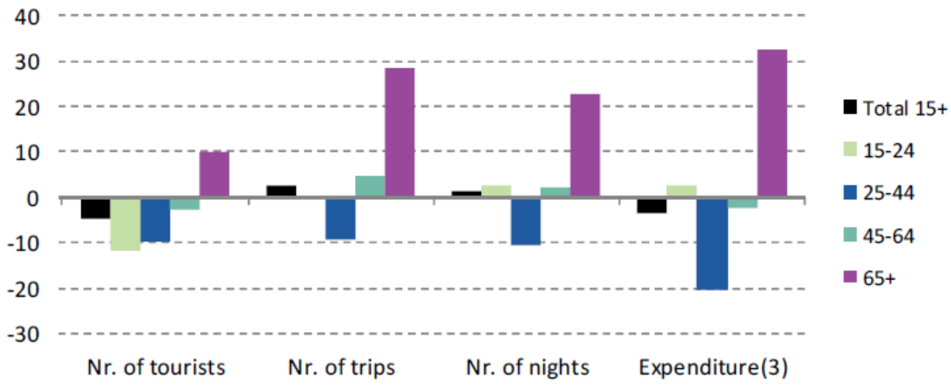
APPENDIX 5 – EU-27 POPULATION AGE PYRAMIDS, 2010-2060



Source: Demography Report 2010 – 2011. *Demography report 2010: Older, more numerous and diverse Europeans*. European Commission.

[34] 2012. The 2012 Ageing Report: Economic and budgetary projections for the 27 EU Member States (2010-2060). European Commission.

APPENDIX 6 – EU-27 TOURISM INDICATORS BY AGE, 2006/2001 (% Change)



Source: Demunter, Christophe. 2012. *Industry, trade and services. Population and social conditions*. Eurostat.

APPENDIX 7 – PORTUGAL AND LISBON TOURISM DATA, 2012 (thousands of guests)

Th of Guests	Portugal	Lisbon
Germany	809,0	215,2
Austria	91,2	26,3
Belgium	172,3	58,7
Denmark	89,0	28,7
Spain	1.216,0	440,0
Finland	65,6	19,6
France	740,4	266,2
Ireland	198,8	33,1
Italy	352,9	169,3
Netherlands	408,1	95,2
Poland	108,2	30,9
UK	1.293,2	183,6
Czech Rep.	32,1	9,3
Sweden	108,0	42,2
Other EU	144,3	62,4
EU Total	5.829,1	1.680,7
Domestic	6.160,6	1.410,2
Inbound	7.684,6	2.705,6
Total	13.845,2	4.115,8

Source: 2013. *Tourism Statistics 2012*. INE.

Note: it was considered the 2012 statistical data since INE has not yet published the 2013 data regarding all inbounds by country of origin and geographical region of destination

APPENDIX 8 – RESPONDENTS NATIONALITIES' DISTRIBUTION

Market (Country of Origin)	Respondents
Germany	353
Belgium and Holand	368
Brasil	400
Scandinavia (Denmark, Sweden, Norway and Finland)	253
Spain	971
EUA	100
France	544
Italy	335
UK	360
Domestic	3.357
Inbound	4.636
Inbound (EU)	**3.684**

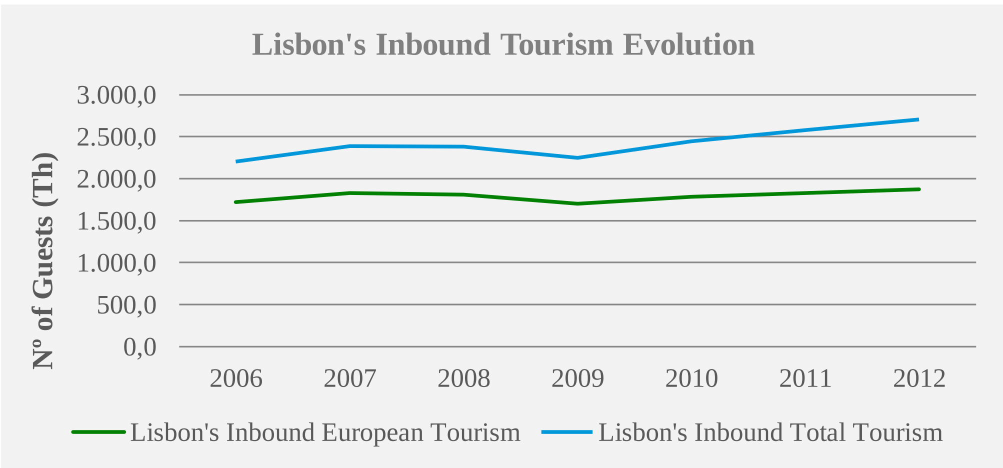
8,2% were seniors (≥65 years old)

<8,2% were seniors (≥65 years old)

Source: 2012. *Motivational Survey 2012: Promotional Area of Lisbon*. Lisbon Tourism Observatory.

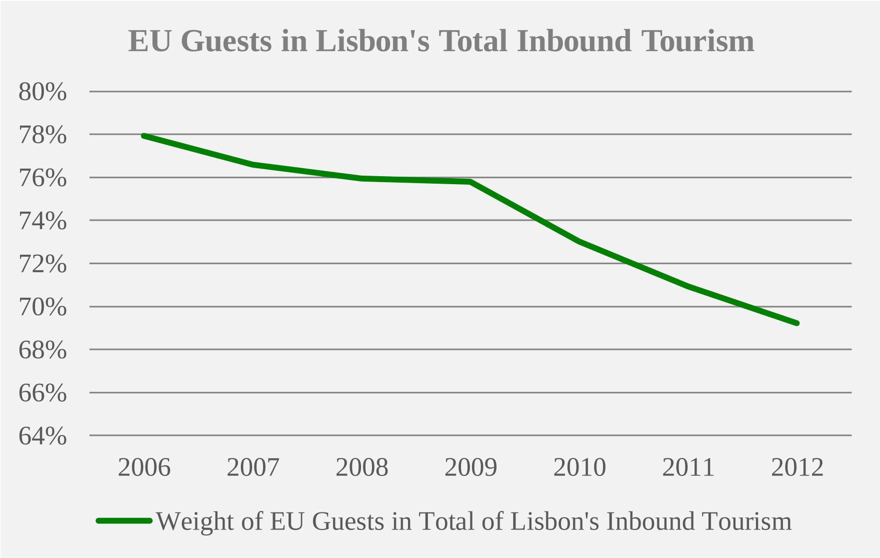
Note: the survey was conducted monthly in the Promotional Area of Lisbon to foreign and domestic tourists in regard of their motivations behind the decision of choosing the Region of Lisbon as a tourism destination.

APPENDIX 9 – LISBON'S INBOUND TOURISM EVOLUTION, 2006-2012 (thousands)



Source: 2006-2012. *Tourism Statistics*. INE.

APPENDIX 10 – EU GUESTS' EVOLUTION IN TERMS OF LISBON'S TOTAL INBOUND TOURISM, 2006-2012 (in %)



Source: 2006-2012. *Tourism Statistics*. INE.

APPENDIX 11 – MARKET SIZE OPPORTUNITY EVALUATION (millions of people)

Assumption/ Reasoning:

Since Eurostat has only published European population projections starting from the year of 2020 till 2060, in this section I used the 2012 statistics from a starting point and then took into consideration some assumptions in order to project the market size opportunity between the period of 2012 and 2020.

1. It is projected a 5% increase in the total number of the EU population between 2010-2040[35]. Thus, it was assumed a 0.17% constant annual growth rate;
2. In 2011, regarding the EU population age structure 17.50% of the population had ≥65 years[36]. Also, until 2020 it is projected that this percentage will increase to about 19%[37];

[35] 2012. The 2012 Ageing Report: Economic and budgetary projections for the 27 EU Member States (2010-2060). European Commission.

3. According to an Eurostat, between 2006 and 2011, the percentage of Europeans with ≥65 years with an active participation in tourism increased by 10 percentage points[38]. Thus, it was assumed that until 2020 the senior segment with an active participation in tourism will continue to increase at the same pace (16% in the period between 2012 and 2020) – even though possibly it will grow faster due to the fact that between 2006 and 2011 the crisis had a negative impact on the tourism sector.

Data	Values	
Total EU-27 Population 2012	503.7	*
% EU-27 Seniors 2012	17.9%	*
Total EU-27 Seniors 2012	90.2	
% EU-27 Seniors 2012 (Tourists)	12.1%	*
Total EU-27 Seniors 2012 (Tourists)	10.9	
Total EU-27 Population 2020	*512.2*	**
% EU-27 Seniors 2020	19.1%	*
Total EU-27 Seniors 2020	97.8	
% EU-27 Seniors 2020 (Tourists)	*28.1%*	**
Total EU-27 Seniors 2020 (Tourists)	*27.5*	**
EU-27 Senior Tourists Increase (2012-2020)	*16.6*	**
Market Size opportunity (yearly increase)	*2.1*	**

* Eurostat data

** Assumptions

Note: all the absolute numbers are in million

APPENDIX 12 – BENCHMARK OF LISBON'S EUROPEAN COMPETITORS

<u>Introductory Note on Measuring the Competitiveness</u>

❖ Parameters Choice

City Attractiveness/ Diversity of Experiences: Lisbon has as main characteristics a high level of safety (Portugal occupies the 18th position in the Global Peace Index 2013[39]), very good hospitality and 7 months per year of good weather. Besides that, Lisbon has won the Award for the Europe's Leading City Break Destination three times in the last 5

[36] http://epp.eurostat.ec.europa.eu/statistics_explained/index.php/File:Population_age_structure_by_major_age_groups,_1991_and_2011_(%25_of_the_total_population).png (accessed on April 10, 2014)
[37] http://epp.eurostat.ec.europa.eu/statistics_explained/index.php/File:Percentage_of_population_aged_65_years_and_over_on_1_January_of_selected_years.PNG (accessed on April 10, 2014)
[38] Demunter, Christophe. 2012. *Industry, trade and services. Population and social conditions*. Eurostat.
[39] http://www.visionofhumanity.org/pdf/gpi/2013_Global_Peace_Index_Report.pdf (accessed on April 3, 2014)

years[40] and Portugal was the two-time winner of Europe's Leading Golf Destination[41], featuring Lisbon with 12 highly rated golf courses[42];

Affordability: although this segment has purchasing power (and besides the fact that despite the free time to travel seniors still enjoy city breaks) mostly, seniors usually spend ≥4 nights at their destinations and make more trips per year than the younger age groups. With that being said, since Lisbon is the cheapest European city regarding 5 star hotels[43] and one of the cheapest European cities to travel to in general, gives the destination a competitive advantage towards some competitors. In effect, tourists can find 5 star hotels in Lisbon cheaper than 4 star and even 3 star hotels in some other European capitals such as Rome or Amsterdam. Thus, when staying in Lisbon the senior segment can enjoy the amenities and perks of a 5-star hotel – features that the segment greatly values – while in other European capitals they could not afford to stay ≥4 nights and still have the money to enjoy other trips with the same standards within the same year.

❖ Measurement Criteria

City Attractiveness/ Diversity of Experiences: the elements where measured based in travel sites such as *Tripadvisor* and Lonely Planet, e-journal articles from Forbes, CNN or *Weatherwise* Magazine (for example), UNESCO's World Heritage List, travel awards achievements and world-class golf courts classifications;

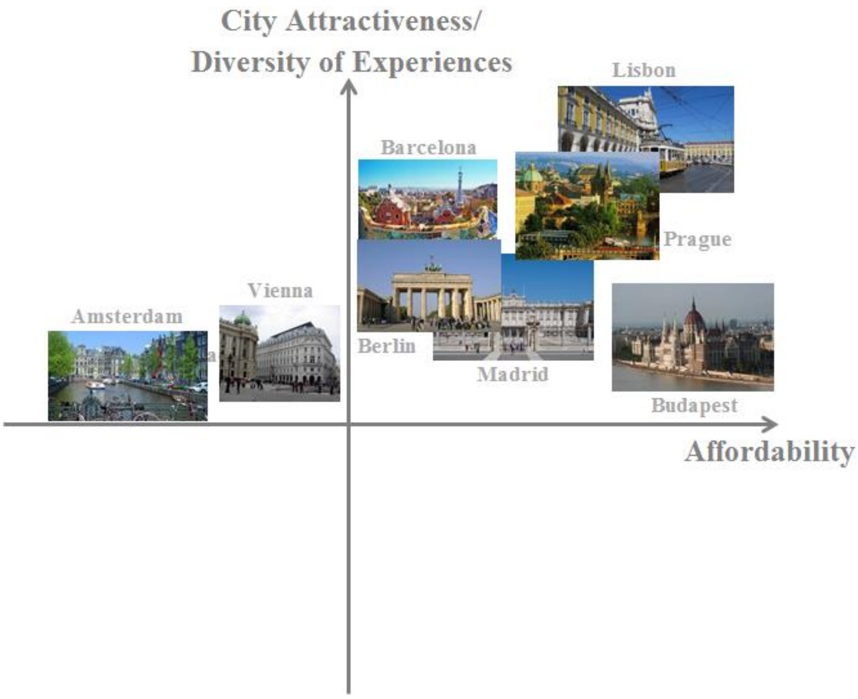
Affordability: all the elements were measured based on the Post Office City Costs Barometer 2013[44].

[40] http://www.worldtravelawards.com/award-europes-leading-city-break-destination-2013 (accessed on April 3, 2014)
[41] http://www.worldtravelawards.com/award-europes-leading-golf-destination-2013 (accessed on April 3, 2014)
[42] http://www.golisbon.com/activities/lisbon-golf.html (accessed on April 3, 2014)
[43] http://press.hotels.com/en-gb/hpi/hotel-price-index-summer-2007/#pays (accessed on April 3, 2014)
[44] http://www.postoffice.co.uk/sites/default/files/City_Costs_Barometer_2013.pdf (accessed on April 2, 2014)

1 - Low level	City Attractiveness/ Diversity of Experiences									Affordability				
5 - High level	Safety	Hospitality	Climate	Culture	Gastronomy	Nature	Golf	City Break	Subtotal	Restaurant Price	Accommodation	City break	Subtotal	Total
Lisbon	4	5	4	4	4	4	5	5	35	4	4	4	12	47
Budapest	4	5	2	5	3	3	3	3	28	5	5	5	15	43
Prague	4	3	3	5	4	5	3	4	31	5	3	4	12	43
Barcelona	3	4	4	4	5	3	4	3	30	3	2	2	7	37
Madrid	4	4	3	3	5	2	3	4	28	2	3	3	8	36
Berlin	5	5	2	4	4	3	3	3	29	1	3	3	7	36
Vienna	5	2	2	4	4	5	3	3	28	2	3	2	7	35
London	4	3	2	3	4	4	4	4	28	3	1	2	6	34
Paris	3	4	2	5	5	3	2	4	28	2	2	2	6	34
Rome	2	4	4	5	5	2	2	4	28	1	1	1	3	31
Venice	3	3	4	4	3	2	1	4	24	2	2	2	6	30
Amsterdam	4	3	2	3	3	4	3	3	25	2	1	1	4	29

Note: the benchmark cities were chosen taking into consideration the marketing research (Appendix 27, Section 2.1 – Topic 9; Section 2.2 – Topic 4), ATL's Strategic Plan 2011-2014 and also in regard of the segment's motivation vs. destination characteristics/offerings.

APPENDIX 13 – LISBON'S POSITIONING MAP



APPENDIX 14 – LISBON'S SWOT ANALYSIS

❖ <u>Strengths</u>

As the senior segment is ready to experience new things and to be active[45], Lisbon's unparalleled offering diversity of touristic products and activities within a short distance radius[46] combined with a 7 month period of mild climate that allows to experience outdoor activities such as cultural touring and sightseeing and sports such golf, gives the region a competitive advantage towards its mains competitors that might have also diversified offerings but do not have unique experiences such as "vintage" tram's cultural touring circuits or even hiking and trekking in a property inscribed on the UNESCO's World Heritage list such as the Cultural Landscape of Sintra[47].

Furthermore, Lisbon is the safest large city in the European Union[48] and the second most welcoming European city[49] and has been a three times award winner in the last five years being considered the Europe's Leading City Break Destination[50].

Since the majority of the senior segment appreciates high quality services and, as already mentioned, Lisbon is the cheapest European city regarding 5 star hotels[51], the fact that it also has a great affluence and diversification of affordable 4 and 5 star hotels (boutique hotels, design hotels, city break hotels, "golf hotels", major international hotel chains) could represent an influencing factor for the segment's choice of the destination.

Lastly, the airport proximity to the city center[52] could also be a key element for the segment when choosing a destination.

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[45] 2011. *Life Will Not Quieten Down: But How will it Change for Baby Boomers Now Turning 65?*. Euromonitor International. http://blog.euromonitor.com/2011/10/life-will-not-quieten-down-but-how-will-it-change-for-baby-boomers-now-turning-65-.html (accessed on May 1, 2014)
[46] 2010. *Getting ready for the future? Present decisions future impacts*. Deloitte Consultores, S.A.
[47] http://whc.unesco.org/en/statesparties/PT/ (accessed on April 6, 2014)
[48] http://www.visitingportugal.com/blog/lisbon-safest-city-in-europe/ (accessed on April 6, 2014)
[49] http://edition.cnn.com/2013/11/29/travel/welcoming-cities/ (accessed on April 6, 2014)
[50] http://www.worldtravelawards.com/award-europes-leading-city-break-destination-2013 (accessed on April 6, 2014)
[51] http://press.hotels.com/en-gb/hpi/hotel-price-index-summer-2007/#pays (accessed on April 3, 2014)
[52] 2010. *Getting ready for the future? Present decisions future impacts*. Deloitte Consultores, S.A.

In regard of ATL's activity, the fact that the provenance of the majority of the funds are as revenues opposed to tourism entities' donations puts the entity in a very comfortable position of not relying in the country's "economic health".

❖ Weaknesses

Although the majority of the seniors are still active, Lisbon lacks of flat and walk-friendly tourist circuits, and has narrow and poorly maintained sidewalks in areas of great touristic and cultural attractions. Beyond that, because of the city's seven hills geography there is a territorial dispersion of the main cultural sights of the city[53] and those are poorly accessible (*Baixa-Chiado, Belém, Castelo de S.Jorge, Sé, Miradouro da Graça*). Not only the city has a poor public transportation network especially when compared with the main competing destinations but also lacks of guidance signaling.

Regarding the segment's motivations, the region of Lisbon has a reduced notoriety as a golf destination (inclusive against the Algarve region), and reduced number of incoming agencies specialized in golf tourism[54]. Moreover, it has also reduced nature tourism promotion and usage of natural parks for touristic purposes[55]. Lastly, the region of Lisbon has a lack of region gastronomic identity and wineries suitable for wine tasting activities especially when compared with other regions of the country.

In regard of ATL's activity, the country's association as being a cheap destination hampers the tourism entities and hotels' efforts in order to increase the ReVPAR. Besides that, ATL also shows a gap in terms of promoting the destination as the Region of Lisbon and not just as the City of Lisbon focusing mainly on the promotion of City Breaks and Meetings Incentives, i.e., focusing on promoting short stays in the city.

[53] 2010. *Getting ready for the future? Present decisions future impacts*. Deloitte Consultores, S.A.
[54] 2010. *Getting ready for the future? Present decisions future impacts*. Deloitte Consultores, S.A.
[55] 2010. *Getting ready for the future? Present decisions future impacts*. Deloitte Consultores, S.A.

❖ Opportunities

If ATL could understand the potential that the Europe's aging population (life expectancy increase) represents in the tourism sector it could act as a pioneer in specializing and promoting a destination for the senior segment in order to take advantage of the segment’s behavior to combat seasonality and explore its purchasing power and free time to make longer trips and more frequently. For that reason, the support and implementation of projects to make Lisbon as an accessible destination should be a priority. Associated with that matter, we are assisting to a “baby boomer reign” where there has been an emergence of new consumption patterns and motivations, favoring destinations that include a high diversity of experiences characterized by authenticity and quality and a diversified tourism product which Lisbon has all the conditions to be known as[56].

In terms of the segment’s motivations, there are endless possibilities to involve Golf tourism with other tourism products and enhance cross-selling (Nature Tourism, Health & Wellness, Gastronomy & Wine, etc.)[57]. Thus, in the same line of thought it could be extremely beneficial to create themed itineraries that encourage a longer stay decentralized from the City of Lisbon[58]. Also, the attraction of more events with international scope that could sell the qualified offer aspect represents a good opportunity to attract the senior segment once they can travel any time of the year. Lastly, in terms of gastronomy the support and promotion of the new generation of Portuguese *Chefs* could introduce the beginning of the creation of a specific and unique gastronomic identity of the region beside the internationally-known *Pastéis de Belém*.

[56] 2010. *Getting ready for the future? Present decisions future impacts*. Deloitte Consultores, S.A.
[57] 2010. *Getting ready for the future? Present decisions future impacts*. Deloitte Consultores, S.A.
[58] 2010. *Getting ready for the future? Present decisions future impacts*. Deloitte Consultores, S.A.

❖ Threats

As socioeconomic challenges evolve so does the competitiveness increases and the tourism sector is no exception of such tendency. The fragile Portuguese economy incapacitates the tourism entities of achieving similar levels of investment when compared with some competing destinations[59]. Further, although the population aging represents a great opportunity for the tourism sector to attract this emergent consumers that still thirst for life and new experiences without having the financial concerns of the younger generations, this same trend could have a negative impact on the pension systems and worsen the level of the European financial crisis in the coming years.

One of the major motivations that influence the seniors to choose a tourism destination is the good weather. With that being said the fierce competition among the Mediterranean countries in order to attract the same emerging markets[60] represents a threat to the ability of Lisbon to attract new segment costumers. Besides that, although Prague and Budapest do not have the same favorable climate as Lisbon, both cities have been emerging as strong competing destinations that offer more competitive prices and also a range of differentiated offerings. Also, ATL has not been successful in terms of promoting the destination as a strong brand (top of mind).

Finally, since the majority of the senior segment appreciates high quality services the fact that the destination is associated to a low cost destination opposed to high quality one, could be a decisive factor for the segment not to choose visit Lisbon.

[59] 2010. *Getting ready for the future? Present decisions future impacts*. Deloitte Consultores, S.A.
[60] 2010. *Getting ready for the future? Present decisions future impacts*. Deloitte Consultores, S.A.

APPENDIX 15 – PROJECTED EVOLUTION OF EU GUESTS IN THE REGION OF LISBON (thousands of guests)

	EU*	EU**	Increment
2015	2.014.718	2.087.273	3,60%
2016	2.064.449	2.157.733	4,52%
2017	2.115.407	2.219.056	4,90%

Source: 2013. *Tourism Statistics 2012*. INE.

*Total number of EU guests (assumption: based on the evolution observed between 2006 and 2012, it was assumed a 2.5% annually growth rate)

**Total number of EU guests with the EU senior guests' incrementing

APPENDIX 16 – PROJECTED AVERAGE SPEND PER TRIP OF AN ≥65 YEAR-OLD TOURIST IN THE REGION OF LISBON (€)

	2012	…	2015	2016	2017
Average Daily Spending*	134,5 €		136,5 €	138,6 €	140,7 €
Average Spending in Transportation	428,7 €		435,2 €	441,7 €	448,3 €
Number of Days	4		4	4	4
Total Spending	966,7 €		981,2 €	996,0 €	1.011,0 €
Number of Guests (increment)	-		72.554	93.284	103.649
Total Guests' Expenditures	-		71.193.950 €	92.912.682 €	104.790.020 €

Source: *Associação do Turismo de Lisboa*

*Without transportation

Note: it was assumed an inflation rate of 1% and an annual growth rate of 0.5% regarding spending

APPENDIX 17 – TARGET ANALYSIS

❖ Brand-Usage Approach

In regard of the leisure travel category it is possible to identify three different types of brand-usage consumers' behavior: brand users (current users), i.e., people who already visited Lisbon; competitors' users, people who visit other destinations apart from Lisbon; category nonusers, people who do not travel for leisure and have not visited Lisbon with that intention but might will in the future.

❖ <u>Geography</u>

Between 2006 and 2012 the main EU inbound markets that visited Lisbon where Germany, Spain, France, Italy and the UK. However, Germany and France where the only that presented a positive growth along the period in question, appearing as being Lisbon's emerging markets (see Table 1). Furthermore, for the study's purpose identifying only the strongest markets it is not accurate. The objective is to identify the main markets within the senior segment, although there are not statistics available regarding the age structure of the markets. Nevertheless, according to the stakeholders' interviews it was possible to identify that the main EU senior markets that visit Lisbon are Finland, France, Germany, Spain, Sweden and the UK. Where UK and Germany appear as the most common markets to be pointed concerning senior visitors (see Table 2).

Table 1 – Weight of Lisbon's Guests by EU Country of Residence, 2006-2012 (%)

	2006	2007	2008	2009	2010	2011	2012
Germany	12,3%	11,4%	12,5%	12,0%	12,0%	12,2%	12,8%
Austria	1,7%	1,4%	1,4%	1,7%	1,4%	1,4%	1,6%
Belgium	3,4%	3,8%	3,8%	3,6%	3,5%	3,4%	3,5%
Denmark	2,0%	1,5%	1,6%	1,5%	1,6%	1,5%	1,7%
Spain	32,8%	31,5%	28,9%	31,9%	32,2%	29,3%	26,2%
Finland	0,6%	1,1%	1,4%	1,6%	1,7%	1,4%	1,2%
France	11,3%	11,8%	12,6%	13,3%	12,9%	14,4%	15,8%
Ireland	1,8%	1,8%	1,9%	2,2%	2,0%	2,0%	2,0%
Italy	12,0%	11,4%	10,8%	10,4%	10,8%	10,7%	10,1%
Netherlands	4,7%	4,4%	4,7%	4,6%	4,5%	5,0%	5,7%
Poland	1,2%	1,5%	1,5%	1,5%	1,6%	1,8%	1,8%
UK	11,4%	11,9%	12,4%	9,9%	10,2%	10,7%	10,9%
Czech Rep.	0,4%	0,4%	0,5%	0,4%	0,5%	0,5%	0,6%
Sweden	2,4%	2,3%	2,1%	2,0%	2,2%	2,1%	2,5%
Other EU Countries	2,0%	3,9%	3,9%	3,4%	3,1%	3,5%	3,7%
	100,0%	100,0%	100,0%	100,0%	100,0%	100,0%	100,0%

Source: 2006-2012. *Tourism Statistics*. INE.

Table 2 – Map of Stakeholders' Responses on EU Inbound Senior Markets that Visit Lisbon

	Ritz Four Seasons Hotel	Tiara Park Atlantic Lisboa	Hotel Palácio Estoril	Grande Real Villa Itália Hotel & Spa	Altis Avenida Hotel	Penha Longa Resort	Hotel Marquês de Pombal	Hotel Vincci Baixa	Memmo Alfama Hotel	Barceló Viagens	Lusonova	Citur	Top Atlântico	Espírito Santo Viagens	Mr. Travel
UK	☑	☑	☑	☑	☑	☑		☑	☑	☑		☑	☑		
Germany	☑	☑	☑		☑	☑	☑	☑	☑		☑				
France	☑	☑	☑		☑			☑	☑					☑	☑
Finland		☑				☑	☑			☑			☑		
Spain	☑	☑	☑	☑									☑		
Sweden		☑		☑			☑			☑		☑			
Norway		☑				☑						☑	☑		
Belgium					☑			☑				☑			
Denmark		☑		☑						☑					
Netherlands				☑		☑						☑			
Switzerland			☑			☑					☑				
Austria											☑	☑			
Ireland				☑											
Italy														☑	

❖ Demography

Although it was previously defined in the Market Definition section that the senior segment consisted of people with ≥65 years, another important parameter that was taken into account during the primary research was the retirement aspect. Thus, in order to draw the segment's behavior it was crucial to look only at retired visitors since that in terms of tourism the consumer behavior of an inactive individual vs. active is completely different. With that being said, within the EU there are different legislations for each country with regard to the official age of retirement (some countries have different retirement ages by gender). However, although there is an established official age of retirement there are disparities between that age and the effective one. Thus, among the targeted markets the official age of retirement between 2007 and 2012 was 65 years for both men and women excepting for women in the UK (see Table 3). On the contrary, the average effective age of retirement in the same period has ranged from 59,7 years for men in France till 63,7 years for men in the UK (see Table 3).

Table 3 – Average Effective Age of Retirement vs. Official Age 2007-2012

	Men		Women	
	Effective	Official	Effective	Official
Austria	64,9	65	62,9	64,5
Belgium	59,6	65	58,7	65
Czech Rep.	63,1	62,5	59,8	61,33
Denmark	63,4	65	61,9	65
Finland	61,8	65	61,9	65
France*	59,7	65	60,0	65
Germany	62,1	65,083	61,6	65,083
Ireland	64,6	66	62,6	66
Italy	61,1	66	60,5	62
Netherlands	63,6	65	62,3	65
Norway	64,8	67	64,3	67
Poland	62,3	65	60,2	60
Spain	62,3	65	63,2	65
Sweden	66,1	65	64,2	65
Switzerland	66,1	65	63,9	64
UK	63,7	65	63,2	61,2

Source: 2013. *Statistics on average effective age and official age of retirement in OECD countries*. OECD.

* For France, workers can retire at age 60 with 41.5 years of contributions

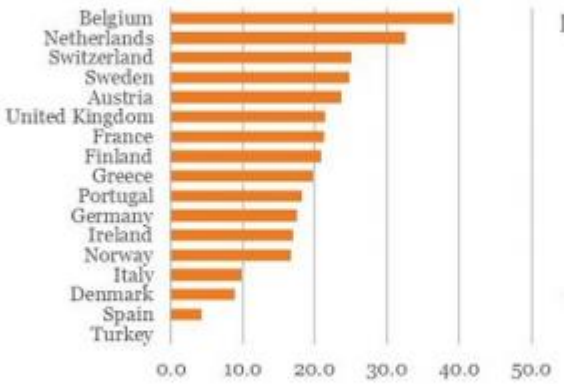
❖ Psychographs

Regarding the segment's lifestyle and the consumers' personality aspects, according to the marketing research this is a segment that – derived from the fact of having a lot of free time – usually remains for longer stays and who does several trips per year. During their stay, this is the segment that enjoys the most to spend time at the hotel and experience its services and common areas (please refer to Appendix 27, Section D). Further, baby boomers see their retirement as an opportunity to start a "second life" and recreate their "golden years" with the same frivoling young spirit[61], thus while doing tourism, there may be individuals who are more active or less but all enjoy doing activities at their own pace and will. On the other hand, regarding social class aspects, in its majority the segment usually stays at 4 or 5-star hotels and also shows the tendency of spending above the general population average[62]. Furthermore, according with Euromonitor *in Western Europe* (which is the region source of Lisbon's strongest markets) *people aged 65+ make up the largest age group in the population with an*

[61] 2011. *Life Will Not Quieten Down: But How will it Change for Baby Boomers Now Turning 65?*. Euromonitor International. http://blog.euromonitor.com/2011/10/life-will-not-quieten-down-but-how-will-it-change-for-baby-boomers-now-turning-65-.html (accessed on May 1, 2014)
[62] Demunter, Christophe. 2012. *Industry, trade and services. Population and social conditions*. Eurostat.

annual gross income of US$150,000+ (that is, the highest income bracket), and yet their share in the top income bracket is expected to rise even further in the period through to 2030[63] (see Table 4).

Table 4 – Percentage of Western European Population with Gross Annual Income over US$150.000, 2013



Source: Hodgson, An. 2014. *Western Europe to Expect Rising Proportion of Over-65s among the Most Affluent Income Earners*. Euromonitor International

APPENDIX 18 – POSITIONING ANALYSIS

In order to successfully position any service (or product), it is essential to understand which are the target audience's preferences (attributes important to customers), its notion of value proposition and also the competitor's offering characteristics[64]. With that being said, in the **Competitor Analysis**' section it was already mentioned that according to the marketing research and also in regard to PENT's strategic tourism products (Sun & Beach, Nature Tourism, Nautical Tourism, Golf, City Break, Health & Wellness, Gastronomy & Wines, Meetings & Congresses, Cultural & Landscape Touring, Residential Tourism & Integrated Resorts[65]), the most valued attributes for

[63] Hodgson, An. 2014. *Western Europe to Expect Rising Proportion of Over-65s among the Most Affluent Income Earners*. Euromonitor International
[64] Lovelock, Christopher H. & Jochen Wirtz, 2011. *Services Marketing, 7th ed,* Prentice Hall.
[65] 2012. *Plano Estratégico Nacional do Turismo, Revisão e Objectivos 2013-2015*. Turismo de Portugal, Ministério da Economia e do Emprego.

senior tourists when they think about traveling are Cultural & Landscape Touring, Gastronomy & Wines, City Break, Nature Tourism and Golf (see Table 1).

Furthermore, although the focus is pointed to the affluent stratum of the senior segment the marketing research showed that despite of not being price sensitive costumers, they are very smart when it comes to spending money and value the most service quality (Appendix 27, Section 1 – Topic 2; Section 2.1 – Topic 13).

Moving on to the competitors' offering, Lisbon has as strongest competitors Prague, Budapest, Barcelona, Berlin and Madrid (section **Competitor Analysis**).

Table 1 – Map of Responses to the Research Interviews on Relevant Motivational Attributes for the Segment to Travel

	Respondents			
Motivations	**Tourists**	**Travel Agencies**	**Hotels**	**Total Number of References**
Cultural & Landscape Touring	13	6	5	24
Gastronomy & Wines	7	6	7	20
City Break	5	1	7	13
Nature Tourism	6	5	2	13
Golf	-	4	6	10
Health & Wellness	1	3	4	8
Sun & Beach	1	2	2	5
Nautical Tourism	1	-	-	1
Residential Tourism & Integrated Resorts	-	1	-	1

APPENDIX 19 – SERVICE PRODUCT CONCEPT DESIGN

In regard to the core product we are dealing with hospitality and tourism delivering benefits. Thus, Lisbon is a safe and welcoming European capital with mild climate most of the year and a wide variety of experiences in a 50 km radius.

Additionally, in terms of supplementary services, and having in mind the marketing research and the behavior of the segment in question, it is possible to highlight the ones which enhance the destination value the most as well as the appeal to the customer's overall experience[66] that should be taken into consideration in regard of the market focused strategy mentioned in the **Positioning** section. Thus, Portugal has a very strong internationally-known brand image when it comes to its gastronomy & wine heritage. This way, despite of not having a typical regional food (besides *pastéis de Belém*), Lisbon has some of the best and most recognized restaurants offering traditional Portuguese food in the country and also it is possible to assess almost any country's region wine bottle imaginable. Further, Lisbon also offers a very rich diversity in terms of culture having a nice blend of museums, monuments (UNESCO world heritage)[67], historic districts (Pombal and Manueline architecture) and the Fado (UNESCO world's intangible cultural heritage of humanity). For those more active and who like to be in touch with nature, the region of Lisbon have a few world-class golf courses and beautiful nature and sea/river landscapes (UNESCO world heritage)[68]. Additionally, there are sporting and cultural events all year around such as the popular marches, the Lisbon Fish Flavors Festival, Portugal Open and soon to be the first International Contemporary Art Fair. In terms of hostel services, the region of Lisbon has some of the top luxury international hotel chains with the advantage of being cheaper than in other European capitals but with the same high quality standards. Finally, it is also possible to enjoy seawater spa treatments where the water is pumped from the actual sea in real time.

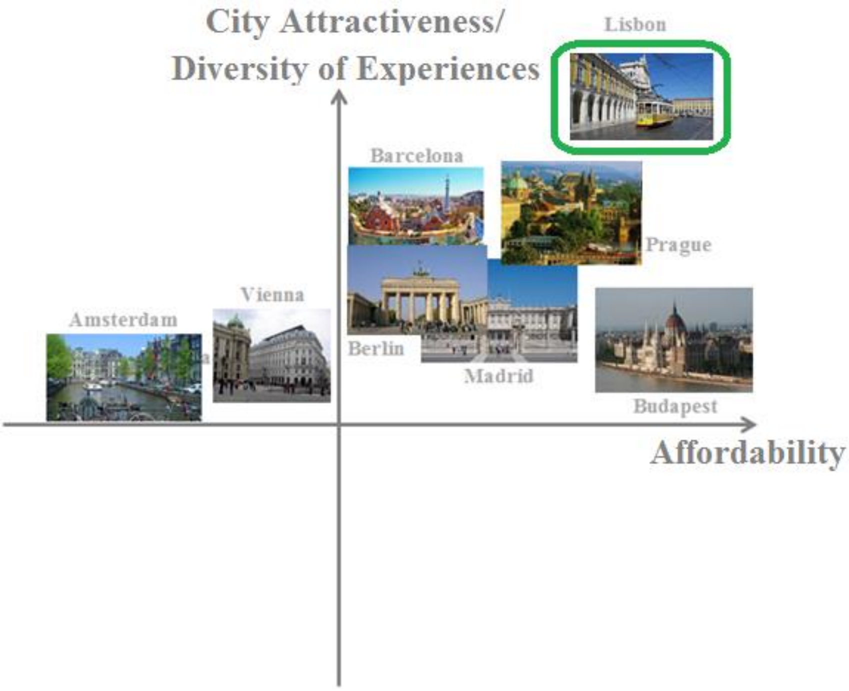
APPENDIX 20 – BRAND LOYALTY SEGMENTATION

Brand loyals (BLs), people who commonly travel for leisure purposes and always choose Lisbon as their number one destination. Favorable brand switchers (FBSs), people who commonly travel for leisure purposes that already have been to Lisbon. Other brand switchers (OBSs), people who commonly travel for leisure purposes to

[66] Lovelock, Christopher H. & Jochen Wirtz, 2011. Services Marketing, 7th ed, Prentice Hall.
[67] http://whc.unesco.org/en/statesparties/PT/ (accessed on May 8, 2014)
[68] http://whc.unesco.org/en/statesparties/PT/ (accessed on May 8, 2014)

competing destinations but who also could try to visit Lisbon and even repeat the trip. Other brand loyals (OBLs), people who commonly travel for leisure purposes and usually choose the same competing destinations (have never been to Lisbon). New category user (NCUs), people who do not travel for leisure purposes (or who do not travel abroad) but who could try to visit Lisbon and even repeat the trip[69].

APPENDIX 21 – DESIRED POSITIONING MAP FOR THE REGION OF LISBON



[69] Dahlen, Michael. Lange, Fredrik. Smith, Terry "Marketing Communications: A Brand Narrative Approach" (2010)

APPENDIX 22 – ATL'S SATISFACTION SURVEY RESPONSES ON THE INFLUENCING ELEMENTS ON THE DECISION TO VISIT LISBON

Influence on the decision to visit Lisbon	Any	Little	Important	Very Important	DK/HNA*
A previous visit	16,9%	8,2%	23,0%	27,3%	24,6%
Family and friends recommendation	12,0%	17,5%	34,4%	27,9%	8,2%
Articles in magazines / newspapers or TV programs	20,8%	24,6%	32,2%	16,4%	6,0%
Consultation of tourist brochures	18,6%	16,4%	39,9%	24,0%	1,1%
Guidebooks consultation	15,3%	18,0%	39,3%	21,3%	6,0%
Advertising on TV / Radio / Press	23,0%	24,0%	31,1%	15,8%	6,0%
Research on travel websites	24,6%	28,4%	21,3%	17,5%	8,2%
Opinions on social networks (Facebook, Twitter, blogs, etc)	42,6%	21,9%	12,0%	15,8%	7,7%
Consulting the site www.visitlisboa.com	37,2%	24,6%	11,5%	14,8%	12,0%
Advertising on Internet	35,5%	20,8%	19,1%	15,3%	9,3%
Travel agent recommendation	23,5%	16,9%	30,6%	23,5%	5,5%
Price of Travel	6,6%	4,9%	32,8%	52,5%	3,3%
Always wanted to visit Lisbon Region	3,8%	7,7%	48,6%	35,5%	4,4%
It was a fluke. Without being waiting, the opportunity came up	12,6%	14,2%	38,3%	24,6%	10,4%

Source: *Associação do Turismo de Lisboa*

*Do not know/ Have not answered

APPENDIX 23 – CREATIVE BRIEF

1. Behavioral Sequence Model

	Decision Stage				
	Need Arousal	Identify Possible Destination	Booking	Holiday	Post Holiday Evaluation
Decision Roles	Self, Companion and Travel Agency (initiators) Self,Companion, Friends & Family and Travel Agency (influencers)	Self,Companion, Friends & Family and Travel Agency (influencers)	Self and Companion (decider, purchaser) Family and Travel Agency (purchaser)	Self and Companion (user)	Self and Companion (user)
Where stage is likely to occur	At Home, at Friends & Family, at Work, at Travel Agency (anywhere)	At Home, at Friends & Family, at Work, at Travel Agency	At Home, at Family, at Travel Agency	At choosen destination (Region of Lisbon)	Anywhere
Timing of stage	2-6 months prior to holiday	After need arousal (immediately or couple months later)	Immediately after identifying the destination	1-3 months after booking	While still in the destination or after
How stage is likely to occur	Friends & Family, Internet, Press, Airlines and Travel Agency	Friends & Family, Internet, Press, Airlines and Travel Agency	Online, Directly, Travel Agency	During the stay	Friends & Family, Internet and Travel Agency (word-of-mouth, posts, feedback)

2. Action Objective

Target	Intended Action	Action Objective
NCUs	Consideration/ Trial and Repeat Purchase	Consider the category and consider visit Lisbon at least once (hopefully become BLs)
OBSs	Trial and Re-Trial	Consider Lisbon as a possible destination to visit at least once

3. Communication Objectives

Category Need	Generate
Brand Awareness	Recall
Brand Preference	Create
Brand Acion Intention	Include
Purchase Facilitation	Include

4. Positioning Statement for the Campaign

Target Audience	**To the almost retired/ retired young-spirit and affluent seniors between the 60s and 70 years old, which are NCUs and OBSs mainly from the UK, Germany and France and Spain, who have/ will have all the free time in the world and seek to travel for longer periods and outside the peak seasons**
Frame of Reference	**The region of Lisbon is the ideal destination to enjoy leisure times**
Points of Difference	**By offering an unparalleled diversity of cultural attractions, sports activities and rich gastronomic experiences always surrounded by breath taking nature landscapes that provide the perfect environment to relax during seven months a year of mild climate**
Reasons to Believe	**Because of its natural beauty, strong cultural heritage and friendly people, characteristics continuously credited by international awards**

5. Mandatory Content

Advertising should	**Emphasize the attribute of high quality services and the benefits of an unparalleled diversity of cultural attractions, sports activities, rich gasronomic experiences, breath taking nature landscapes and mild climate almost all year-around;** **Use the slogan: "Lisbon, the region that offers everything for everyone who has all the free time in the world";** **Must mention travelling and leisure as entry tickets.**

APPENDIX 24 – FINANCIALS

Assumptions/ Reasoning:

- ATL forecasted an amount of €16.906,9 thousands and €19.317,8 thousands for the total investment in tourism promotion for the year of 2013 and 2014 respectively. This way, and having in mind ATL's privileged revenue structure comprising 51% of own revenues[70] as well as the promising results showed by the sector which in 2013 the sector presented the best results ever made being the sector that contributed most to the commercial balance in the same year, puts the sector in a priority position[71], it was assumed a 5% yearly increment in the total investment between 2015 and 2017 (please refer to Table 1);

[70] 2013. *Plano de Actividades e Orçamento para 2014*. ATL, Visitors and Convention Bureau.
[71] http://economico.sapo.pt/noticias/pires-de-lima-elogia-recorde-no-turismo-em-2013_187185.html (28.04.14)

- Due to the fact that this project's purpose is only to take advantage of the opportunity that the tendency of the aging population in Europe represents for the tourism sector and thus attract the proposed targeted market to come to Lisbon, this is a strategy focused only on one competitive element which means that the ATL will have in parallel other competitive elements on the agenda regarding Lisbon's promotion, i.e., only a portion the overall budget is going to be allocated to this plan;

- The total investment allocation to the Marketing Plan followed the same structure as the ATL's Strategic Plan 2011-2014 budget allocation. This way, the total investment allocated to the Plan was subdivided into three groups (tourist-focused promotion: advertising, website, press; trade-focused promotion: tourism fairs, partnerships with tour operators, partnerships with airlines; other: promotional materials and other activities) by year and then then divided by the different activities to be implemented[72] (please refer to Table 5);

- The budget split by issuing markets followed three criteria: primary and secondary target, the representativeness of the markets in regard of the number of guests that entered Lisbon between 2006 and 2012 (please refer to Appendix 17), the representativeness of the senior segment that generated overnights stays in the Region of Lisbon for targeted market in 2009[73] (please refer to Table 2);

- The budget split by competitor markets was based on the competitive proximity (please refer to Appendix 13), however since the budget allocation to this category was suggested to be small only the top three competitive markets where choose to invest (please refer to Table 3);

[72] 2010. *Getting ready for the future? Present decisions future impacts*. Deloitte Consultores, S.A.
[73] 2010. *Getting ready for the future? Present decisions future impacts*. Deloitte Consultores, S.A.

- In terms of the return on investment, it was assumed a 10% contribution margin for the tourism industry – based on an analysis done to 9 international hotel chains' annual reports[74] where the majority of the contribution margins varied between 11% and 13% – and considered as revenues, the Total Guests' Expenditures projected (Appendix 16) minus a 23% tax (please refer to Table 4).

Table 1 – Total Investment Budget Allocation

Th€	2015	2016	2017
Total Investment Budget	20.283,7	21.297,9	22.362,8
Budget Allocation	16%	8,5%	8,0%
Total Media Budget (IMC Plan)	3.245,4	1.810,3	1.789,0

Table 2 – Allocation of Total Investment in Issuing Markets by Market

Th€	2015	2016	2017	%
UK	508,4	548,0	540,9	35%
France	470,2	506,9	500,4	33%
Germany	292,3	315,1	311,0	20%
Spain	173,3	186,8	184,4	12%
Total	1.444,2	1.556,9	1.536,8	100%

Table 3 – Allocation of Total Investment in Competitive Markets by Market

Th€	2015	2016	2017	%
Prague	101,3	90,4	90,7	52%
Barcelona	42,8	38,2	38,4	22%
Budapest	50,6	45,2	45,4	26%
Total	194,7	173,8	174,4	100%

Table 4 – Return on Investment

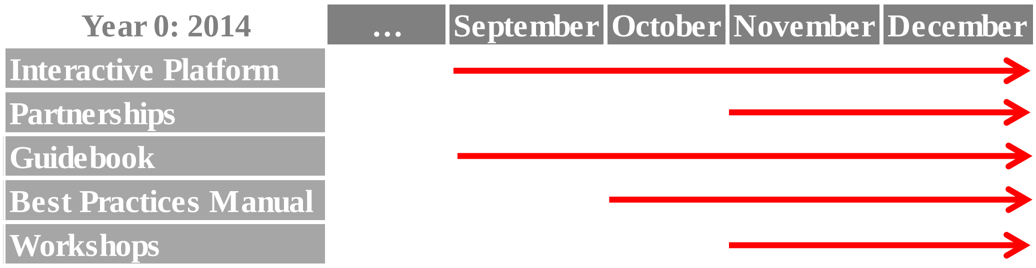
	2015	2016	2017
Total Guests' Expenditures	71.193.950 €	92.912.682 €	104.790.020 €
IVA	23%	23%	23%
CM	10%	10%	10%
Investment	3.245.387,8 €	1.810.317,9 €	1.789.020,0 €
ROI	169%	395%	451%

[74] Hilton Worldwide, Loews Hotels, InterContinental Hotels Group, Starwood Hotels & Resorts, Mandarin Oriental Hotel Group, Jetwing Hotels, EIH Limited, Meliá Hotels International and Serena Hotels

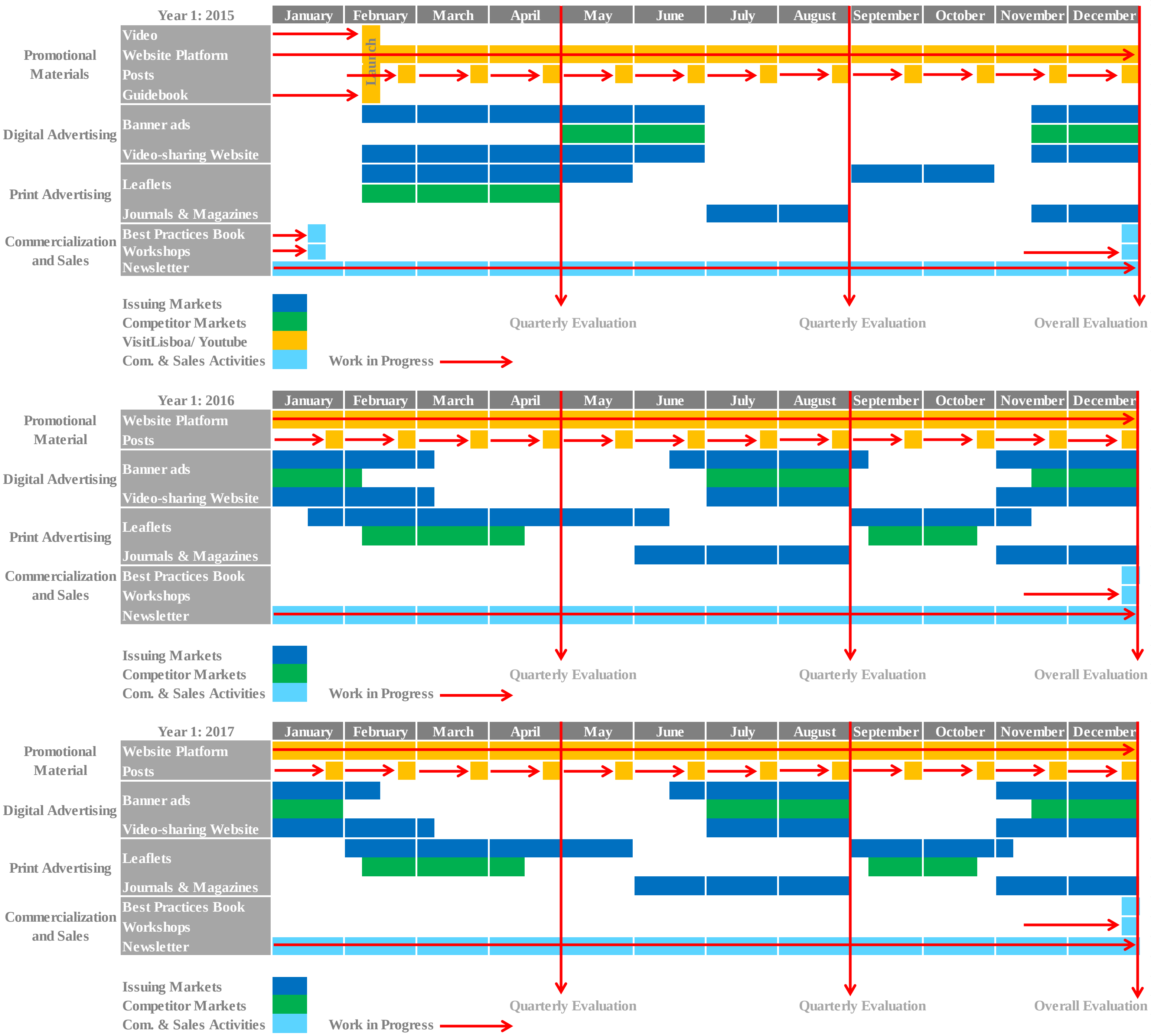
Table 5 – Marketing Plan Budget Allocation (thousands)

	2015								2016						2017					
	Tourist		Trade		Other		Total		Tourist		Trade		Total		Tourist		Trade		Total	
Budget Allocation (Th €)	**1.298,2**	**40%**	**811,3**	**25%**	**1135,9**	**35%**	**3.245,4**	**100%**	**1.086,2**	**60%**	**724,1**	**40%**	**1.810,3**	**100%**	**1.162,9**	**65%**	**626,2**	**35%**	**1.789,0**	**100%**
General Expenses (Advertising)	**389,4**	**30%**			**1.135,9**	**100%**	**1.525,3**	**47%**	**43,4**	**4%**			**43,4**	**2%**	**46,5**	**4%**			**46,5**	**3%**
Interactive Platform	389,4	100%					389,4	26%	43,4	100%			43,4	100%	46,5	100%			46,5	100%
Guidebook					22,7	2%	22,7	1,5%												
Video (leaflets key visuals)					1.113,2	98%	1.113,2	73%												
Total Investment in Issuing Markets	**714,0**	**55%**	**730,2**	**90%**			**1.444,2**	**45%**	**869,0**	**80%**	**687,9**	**95%**	**1.556,9**	**86%**	**941,9**	**81%**	**594,8**	**95%**	**1.536,8**	**86%**
Digital Advertisement	**535,5**	**75%**					**535,5**	**37%**	**651,7**	**75%**			**651,7**	**42%**	**659,3**	**70%**			**659,3**	**43%**
Banner ads	321,3	60%					321,3	60%	391,0	60%			391,0	60%	395,6	60%			395,6	60%
Video-sharing Website	214,2	40%					214,2	40%	260,7	40%			260,7	40%	263,7	40%			263,7	40%
Print Advertising	**178,5**	**25%**	**730,2**	**100%**			**908,7**	**63%**	**217,2**	**25%**	**687,9**	**100%**	**905,2**	**58%**	**282,6**	**30%**	**594,8**	**100%**	**877,4**	**57%**
Leaflets			730,2	100%			730,2	80%			687,9	100%	687,9	76%			594,8	100%	594,8	68%
Journals & Magazines	178,5	100%					178,5	20%	217,2	100%			217,2	24%	282,6	100%			282,6	32%
Total Investment in Competitor Markets	**194,7**	**15%**					**194,7**	**6%**	**173,8**	**16%**			**173,8**	**10%**	**174,4**	**15%**			**174,4**	**10%**
Digital Advertisement	**194,7**	**100%**					**194,7**	**100%**	**173,8**	**100%**			**173,8**	**100%**	**174,4**	**100%**			**174,4**	**100%**
Banner ads	116,8	60%					116,8	60%	104,3	60%			104,3	60%	104,7	60%			104,7	60%
Video-sharing Website	77,9	40%					77,9	40%	69,5	40%			69,5	40%	69,8	40%			69,8	40%
Total Investment in Commercialization and Sales			**81,1**	**10%**			**81,1**	**3%**			**36,2**	**5%**	**36,2**	**2%**			**31,3**	**5%**	**31,3**	**2%**
Workshops			64,9	80%			64,9	80%			32,6	90%	32,6	90%			28,2	90%	28,2	90%
Best Practice Manuals			12,2	15%			12,2	15%			1,8	5%	1,8	5%			1,6	5%	1,6	5%
News letter			4,1	5%			4,1	5%			1,8	5%	1,8	5%			1,6	5%	1,6	5%

APPENDIX 25 – ACTIONS TO TAKE BEFORE THE PLAN’S IMPLEMENTATION



APPENDIX 26 – IMPLEMENTATION CYCLE MAP



APPENDIX 27 – MARKETING RESEARCH

❖ Section 1: Secondary Research's Insights

The Secondary Research was conducted with the intention of getting a first approach to the subject aimed to study. Thus, it is important to mention that in terms of limitations there are few relevant and reliable literatures about the senior segment's behavior, interests and motivations in regard of tourism activities.

Topic 1: Relevant Statistical Data about the Segment's Travel Behavior

According to a European Commission's report on the Preferences of Europeans towards Tourism there are some relevant data by age group even though its segmentation in regard of the senior segment is tabulated as ≥55 years old. Ergo, in terms of motivations that lead an individual to decide go on holiday, age plays a fundamental role and the older segment is the more likely to mention nature as a reason to travel and the least likely to mention sun/beach. In addition, this segment is less likely to regard family and friends recommendations as well as social media, on the other hand is the most likely to mention tour operators. Finally, the older segment is the most probable to take long-stay holidays (≥13 consecutive nights) and the least probable taking short-stay trips[75]. Thus, according to Eurostat statistics, European seniors (≥65 years old) have been showing a higher average of nights spent per trip as well as more trips per year and also is the age group that spends more money during their trips[76].

Topic 2: Relevant Insights on the Segment's Consumer Behavior

Senior tourists are likely to be more experienced and discerning travelers, always having a clear sense of what activities and experiences they want to live while on a destination. Ergo, being also more demanding in terms of quality of the services. Based

[75] 2014. *Flash Eurobarometer 392, Preferences of Europeans towards Tourism*. European Commission
[76] Demunter, Christophe. 2012. *Industry, trade and services. Population and social conditions*. Eurostat.

on the fact that this age group has more leisure time, travel could be seen by some not as an activity but as a lifestyle. Being retired also means that this group could be characterized as having fewer financial commitments and being in the possession of more savings and assets especially in the period immediately after retirement. Also, because they are retired, the senior group does not have the constraints regarding availability to travel: they are free to travel in off-peak seasons as well as travel more and for longer periods[77]. In addition, according to a study done about senior guests in Algarve hotels[78], senior guests appreciate not be treated as a distinct group and particularly value aspects such as being welcomed and treated with familiarity, having common areas available to stay away from the bustle, having pedestrian circuits to walk and to feel safe in the hotel and the surrounding public spaces.

❖ Section 2: Primary Research

The Primary Research had an exploratory character and consisted in a qualitative research due to the fact of the difficulties in reaching a significant sample because of the age range and also because of the foreign origin of the population in question. It is important to mention that in regard of limitations, I am not a professional researcher and also the tourists' interviews were not conducted in my native language neither in the one of the majority of the interviewees.

Hereupon have I conducted 29 interviews of which, 15 were conducted to stakeholders (9 hotels and 6 travel agencies) where all of them were conducted in person and recorded; and 14 were conducted to tourists in the *Belém* and *Baixa-Chiado* areas of the city of Lisbon.

[77] http://www.acsedu.co.uk/Info/Hospitality-and-Tourism/Tourism/Senior-Tourism.aspx (accessed on March 26, 2014)
[78] Figueiredo, Wilson Zacarias & João Barreto Pedro & Margarida Rebelo & Carla Cachadinha. 2011. *Attractive Hotels for Senior Guests: The Experience of the Algarve Region*. Book of Proceedings Vol. I – International Conference on Tourism & Management Studies

❖ Section 2.1: Stakeholders' Interviews Insights

Topic 1: EU Senior Tourists' Nationalities

	Ritz Four Seasons Hotel	Tiara Park Atlantic Lisboa	Hotel Palácio Estoril	Grande Real Villa Itália Hotel & Spa	Altis Avenida Hotel	Penha Longa Resort	Hotel Marquês de Pombal	Hotel Vincci Baixa	Memmo Alfama Hotel	Barceló Viagens	Lusonova	Citur	Top Atlântico	Espírito Santo Viagens	Mr. Travel
Austria											☑	☑			
Belgium					☑			☑				☑			
Denmark		☑		☑						☑					
Finland		☑				☑	☑			☑			☑		
France	☑	☑	☑		☑			☑	☑					☑	☑
Germany	☑	☑	☑		☑	☑	☑	☑	☑		☑				
Ireland				☑											
Italy														☑	
Netherlands				☑		☑						☑			
Norway		☑				☑						☑	☑		
Spain	☑	☑	☑	☑									☑		
Sweden		☑		☑			☑			☑		☑			
Switzerland			☑			☑					☑				
UK	☑	☑	☑	☑	☑	☑		☑	☑	☑		☑	☑		

When the interviewees where asked about the EU inbound senior markets that visit Lisbon, the most common markets that were pointed out were Finland, France, Germany, Spain, Sweden and the UK; where the UK and Germany were the top two markets mentioned concerning senior visitors.

Topic 2: Booking Process and Accommodation

In regard of the booking process, the interviewees' responses were pretty homogeneous. Thus, the methods used by the segment to book the trips are through a travel agency, directly with the hotel or the internet; where the travel agency is the most frequently method used and the internet the least. In regard of the travel agencies interviewed, in its majority they are initially contacted via international partner agencies or branches of the same agency. Further, when dealing with a travel agency, the segment usually asks for a hotel and plane (sometimes shuttle, tour activities and restaurants) "package". On the other hand, when dealing directly with the hotel, if it is a 5-star hotel the segment usually asks the hotel for a shuttle and private drivers for city touring and restaurant tips and reservations; if it is a 4-star hotel the segment usually relies on the hotel to book city tours and restaurants. In addition, both hotel and travel agency's stakeholders responded that the segment usually books its trips with more antecedence than the younger age groups; asks for rooms closer to the elevator and with twin beds; and also for standard rooms but with the best view.

Finally, in terms of the accommodation typology the majority of the travel agency's stakeholders responded that the segment usually stays at 4 and 5-star hotels.

Topic 4: Transportation to the Destination

All the interviewees responded that the majority of the segment comes to Lisbon by plane although there is a big percentage of the Spanish market that chooses to come driving. Also, a few interviewees responded that only a small percentage of EU senior tourists came by cruise once Lisbon is not a starting or ending point of cruise routes.

Topic 5: Attractions/ Activities

When the interviewees were asked about the attractions and activities that the segment most looks forward to experience during its stay in the region of Lisbon, the responses pointed out the most to the desire of getting to know the city and its historical monuments (cultural touring), to enjoy the riverside/seaside and nature abundant areas (*Belém, Sintra, Cascais*), to play golf, to experience the typical Portuguese gastronomy (and to eat good fish and seafood) and listen to *Fado*. Also, an important feature pointed out was the opportunity to relax and take their own time to do whatever they plan doing during the stay – "*it is a client that due to its age and to the fact of staying at the hotel for longer periods, really appreciates the opportunity to relax and rest apart from the planned activities*" by Grande Real Villa Itália Hotel & Spa's Front Office Manager.

Topic 6: Repeat Purchase

When the interviewees were asked about the segment's behavior in terms of repeat purchase and its periodicity, the responses were not consensual. On the one side, there were respondents that stated that it is common for the EU senior segment to come back to Lisbon every year or every two years due to the quality of the services and also because of the positive impact that the destination provokes among the visitors – "*it is a client that often comes back because of the quality of the services*", by Ritz's Hotel Director of Rooms; "*the feedback that our customers give us is that people are lovely and they welcome tourists... people feel a genuine sympathy from the locals and this obviously leaves a positive feeling, they feel welcome and end up keep coming back*", by Altis Avenida's Hotel Manager Assistant. On the other, the respondents argued that there is not a large incidence of repeat purchasers' within the segment due to their advanced age and also because of Portugal's small dimension as a country – "*in our hotel there is not a large number of clients within the segment that come back since despite having all the free time to travel, age is a factor that weighs and therefore they are in a hurry to meet other destinations that they had not the chance to visit while having a career*", by Tiara's Hotel Rooms Division Director; "*this is a segment that hardly comes back once they travel for longer periods of time, they have the opportunity to visit Portugal. Thus, due to their advanced age, they end up wanting to get to know other destinations*", by Espirito Santo Viagens's Executive Committee Vice Chairman.

Topic 7: Client Typology

When the interviewees were asked about how the segment travels (individually vs. group) the responses were homogeneous. The stakeholders affirmed that in its majority the segment in question travels individually, more concretely, as a couple or with other friend couples. However, it was made a clear point that there are also a lot of senior groups that came to visit Lisbon but usually came in group series with a package previously determined that includes plane, hotel, alimentation and activities' expenses. Thus, it is a segment pointed out as having lower purchasing power – "*we have more groups of senior tourists but they always look for the best prices and usually buy full board packages. This is a client that has a lower economic power*", by Lusonova's Incoming Agent.

Topic 8: Months of Affluence and Length of Stay

	January	February	March	April	May	June	July	August	September	October	November	December
Ritz Four Seasons Hotel			☑	☑	☑	☑			☑	☑		
Tiara Park Atlantic Lisboa			☑	☑	☑	☑			☑	☑	☑	
Hotel Palácio Estoril	☑	☑	☑							☑	☑	☑
Grande Real Villa Itália Hotel & Spa	☑	☑	☑						☑	☑	☑	
Altis Avenida Hotel				☑	☑	☑			☑	☑		
Penha Longa Resort		☑	☑	☑	☑							
Hotel Marquês de Pombal		☑	☑	☑	☑	☑			☑	☑	☑	
Hotel Vincci Baixa	☑	☑	☑	☑	☑				☑	☑	☑	
Memmo Alfama Hotel	☑	☑	☑	☑	☑						☑	☑
Barceló Viagens	☑	☑	☑							☑	☑	☑
Lusonova		☑	☑	☑					☑	☑	☑	
Citur									☑	☑		
Top Atlântico	☑	☑	☑	☑						☑	☑	☑
Espírito Santo Viagens	☑	☑	☑	☑	☑				☑	☑	☑	☑
Mr. Travel				☑	☑				☑	☑		

The interviewees' responses on the topic about the months chosen by the segment to visit Lisbon where similar to what was found in terms of the secondary research, i.e., the EU seniors choose to come to visit Lisbon in the off-peak seasons and outside the school vacations' period. Ergo, September, October, November, February, March and April were the most mentioned months in regard of affluence of senior visitors. In addition, about the length of stay, the majority of the interviewees responded that the segment usually stays in the region of Lisbon on average for 3 to 4 nights.

Topic 9: Competitors

When the interviewees were asked about what was their opinion in terms of Lisbon's top competitor destinations considering the segment, the responses were somewhat heterogeneous. However, Prague and Budapest were the most common destinations mentioned once for being "new" destinations, trigger a greater curiosity, as well as Spain due to its strong offerings directed specifically to the segment – "*I think Spain in general is a strong competitor because it has climate conditions similar to ours but a superior marketing & sales force as well as a larger offering variety. On the other hand, Budapest and Prague have been emerging as top competitors due to its "novelty" aspect... and then there are also cities such London, Paris, Rome and Milan that I think are superior to Lisbon in terms of luxurious tourism*", by Ritz's Hotel Director of Rooms.

Topic 10: Trend Acknowledgment

When the interviewees were asked if they notice a growing trend in the number of the EU senior visitors, in its majority they answered that they do notice a growth in the number of EU senior customers and they also acknowledge the potential that the segment could represent if they are able to capture it – "*Europe is aging and its upper middle class is growing, this is a segment that has been showing some growth and also is constituted by people who have experience traveling, the only change is the way they do it. It is a segment that in terms of marketing has been much talked about in recent years for being a segment with time and purchasing power to travel but unfortunately we (Lisbon) do not have many specific products for this segment and perhaps this is* *why the segment does not develop more here*", by Espirito Santo Viagens's Executive Committee Vice Chairman.

Topic 11: Strategy towards the Segment

In terms of strategies developed by the tourism entities interviewed to attract specifically the segment in study, only one of the stakeholders assert that they have a specific strategy to capture the senior segment – "*we have several promotional campaigns targeting the senior segment mainly in Spain and also when we go to Tourism Fairs in Germany, France and Italy for example*", by Barceló Viagens's Commercial Director. However, in its majority, they argued that they do not promote towards any specific age group.

Topic 12: TP's Strategic Tourism Products

	Sun & Beach	Nature Tourism	Nautical Tourism	Golf	City Break	Health & Wellness	Gastronomy & Wines	Meetings & Congresses	Cultural & Landscape Touring	Residential Tourism & Integrated Resorts
Ritz Four Seasons Hotel				☑	☑		☑		☑	
Tiara Park Atlantic Lisboa					☑	☑	☑			
Hotel Palácio Estoril		☑		☑	☑	☑			☑	
Grande Real Villa Itália Hotel & Spa	☑			☑		☑	☑			
Altis Avenida Hotel				☑	☑	☑	☑		☑	
Penha Longa Resort		☑		☑			☑			
Hotel Marquês de Pombal	☑				☑		☑			
Hotel Vincci Baixa				☑	☑		☑		☑	
Memmo Alfama Hotel					☑				☑	
Barceló Viagens	☑	☑		☑			☑		☑	
Lusonova	☑	☑		☑		☑	☑		☑	
Citur		☑		☑		☑	☑		☑	☑
Top Atlântico				☑			☑		☑	
Espírito Santo Viagens		☑			☑		☑		☑	
Mr. Travel		☑				☑	☑		☑	

Note: these 10 strategic tourism products were elected in PENT and are the products chosen to promote Portugal as a tourism destination

In regard of the TP's tourism strategic products, the stakeholders' responses enumerated as the most relevant for senior tourists the following: Golf, City Break, Gastronomy & Wine (as complementary) and Cultural & Landscape Touring.

Topic 13: Segment's Consumer Behavior

After analyzing the responses of all interviewees, it was possible to find some patterns relating to the consumer behavior of the segment in question and also common with the secondary research insights. Thus, the segment was characterized by being not price sensitive and susceptible to buy upgrading promotions and services at the hotel. The segment also is the one who spends more money at the hotels (when compared with the other age groups) and also values the most high quality services – *"these are customers who are very susceptible to buy promotions if properly structured and presented in a way that give them a sense of quality and value added"*, by Tiara's Hotel Rooms Division Director; *"it is not a price-sensitive customer and easily purchases services in the hotel because they trust in our high quality standards"* by Ritz's Hotel Director of Rooms; "*formerly we had a lot of "backpack" tourism, nowadays the quality (luxury) tourism is coming to Lisbon which is very important to us because they are the ones who spend more and also value the most the quality of services*", by Barceló Viagens's Commercial Director.

In the case of the hotel stakeholders' responses, the segment was characterized as being the segment that most enjoys to hang out in the hotel common areas although away from the other guests' hustle; that often asks the hotel staff for information of how to walk around or just to chat; as being the segment that appreciates a personalized and friendly service. Finally, in regard of the hotel/ travel agency's interaction with the segment, this one was characterized by being people with a cultural knowledge above the average and very determined in terms of what they are looking to experience but at the same time opened to suggestions that could fit better their expectations (activities, attractions, restaurants) – "*This type of customer spends plenty of time in the hotel, the senior client divides its time between the hotel and outside experiences; is a frequent user of the bar, the terrace restaurant and the spa*", by Ritz's Hotel Director of Rooms; "*these guest need a lot of attention and patience from the staff once they like to feel welcome and familiar… they frequently ask for directions and we always have to make sure to take the time for them to understand us or just to give them the attention they want to get*", by Hotel Vincci Baixa's First Line Receptionist; "*These are clients with a cultural level above the average and who know very well what they want without being overly demanding*", by Grande Real Villa Itália Hotel & Spa's Front Office Manager; "*It is a client that asks a lot for assistance despite being a very enlightened client*", by Ritz's Hotel Director of Rooms.

❖ Section 2.2: Tourists' Interviews Insights

Although a small number of tourists was interviewed and thus, it is not possible to take conclusions that could be generalized to the whole population, the objective was to observe if the responses were far from what was observed in the secondary research as well as on the stakeholders' interviews insights and possibly to get to know other interesting facts in first hand. Therefore, the tourists' responses "matched to perfection" (in regard of the common subjects) the other researches' insights and added other relevant information.

Topic 1: Familiarity with the Destination and Satisfaction

	First time in Portugal?/ How often do you come?	First time in Lisbon?/ How often do you come?	Intention to come back? When?	Recommend Lisbon to a friend?
I1	Yes/ n.a.	Yes/ n.a.	Not sure	Yes
I2	Yes/ n.a.	Yes/ n.a.	Maybe	Yes
I3	Yes/ n.a.	Yes/ n.a.	Maybe	Yes
I4	No/ Every 2 years (4th time)	No/ Every 2 years (3rd time)	Yes/ 15 months	Yes, already reccommend and many have come
I5	Yes/ n.a.	Yes/ n.a.	Yes	Yes
I6	No/ Every 2 years (5th time; a lot to Algarve)	No/ Every 2 years (3rd time)	Yes/ 15 months	Yes, already reccommend and many have come
I7	Yes/ n.a.	Yes/ n.a.	Yes	Yes
I8	Yes/ n.a.	Yes/ n.a.	Yes	Yes
I9	No/ 3rd time	No/ 2nd time	Yes, if life time allows	Yes
I10	Yes/ n.a.	Yes/ n.a.	Yes	Yes
I11	Yes/ n.a.	Yes/ n.a.	No, because of the age	Yes
I12	Yes/ n.a.	Yes/ n.a.	No	Yes
I13	No/ 2nd time	Yes/ n.a.	Does not know	Yes
I14	No/ has lived in Lisbon but did not come to Portugal for 15 years	No/ has lived in Lisbon but did not come to Lisbon for 15 years	Cannot say	Yes

According with the tourists' responses, the majority of the EU seniors that were interviewed had never been to Lisbon (or Portugal). In addition, in terms of intention of coming back the responses were mixed, however the reason is not associated to a low level of satisfaction. In fact, all of the interviewees responded that they would recommend Lisbon to their friends.

Topic 2: Visit Purpose and Motivations to choose a Destination

	Purpose of visit?	Why Lisbon? (motivations)	Lisbon attractions/activities? (motivations)	Main features about a destination for you to visit it?	Turismo de Portugal's relevant tourism strategic products? (motivations)
I1	Leisure (vacation)	Read about its culture	Museums, castle, parks	Water ladscapes, parks, museums	Nature Tourism, Cultural & Landscape Touring
I2	Leisure (tourism)	The wife choose it	Sightseing and shopping	Good weather and nice people	Gastronomy & Wines, Cultural Landscape & Touring, City Break
I3	Leisure (holiday)	Because some friends live in Lisbon	Attractive places, restaurants, sightseing (although not typical touristic places)	Good climate, location, recommendations	Gastronomy & Wines, Cultural Landscape & Touring, City Break
I4	Leisure (sunshine)	Because of the city's sightseing scenario	Sightseing and shopping	Good hotels, warm weather, sightseing (no beach holidays, too hot)	Cultural & Touring, Nature Tourism
I5	Leisure (holiday)	Recommendation of friends	Special restaurants, sightseing, architecture, parks/gardens	To be a new place	Gastronomy & Wines, Cultural Landscape & Touring
I6	Leisure (vacation)	Sightseing	Sightseing, walk around Lisbon and Cascais	Warm weather, nice tourism places	Gastronomy & Wines, Cultural Landscape & Touring, City Break
I7	Leirsure (curiosity)	Because it is the country's capital and also was recommended	Sightseing	Good climate	Cultural & Touring
I8	Leisure	The wife choose it	Talk to locals, walk around, churches	Nature and hills	Nature Tourism, Nautical Tourism
I9	Leisure (tourism)	Proximity to home country, enjoys to vary destinations	Sightseing, culture	City culture, good climate	Gastronomy & Wines, Cultural & Landscape Touring, City Break
I10	Leisure	To get to know the city	City as a whole	Good weather, culture and nice landscapes	Sun & Beach, Nature Tourism, Gastronomy & Wines, Cultural & Landscape Touring, City Break
I11	Leirsure (curiosity)	Recommendation of friends	Sightseing	Good climate, cultural attractions	Cultural & Touring
I12	Leisure (holiday)	New destination	Sea landscapes	Cultural events, good climate	Nature Tourism, Cultural & Landscape Touring
I13	Leisure	To get to know the city	Cultural attractions	Nice bars and food experiences, museums	Gastronomy & Wines, Cultural Landscape & Touring
I14	Leisure (nostalgia)	His wife died last year and he wanted to revive old memories form the time they lived in Lisbon	Relax	History, people	Nature Tourism, Health & Wellness, Cultural & Landscape Touring

All of the interviewees responded that they were traveling for leisure purposes.

When asked about their motivations behind the choice of Lisbon as a destination to travel, the responses were pretty heterogeneous. However, because of a friends' recommendation and to get to know the city's culture were the two motivations most mentioned. In addition, when asked about what they look forward to experience almost every interviewee responded to sightseeing (among other attractions/ activities).

In terms of main features that a destination has to have in order for them to feel attracted to visit it, the respondents most mentioned good climate and cultural attractions. In addition, in terms of TP's tourism strategic products they named as the most relevant Cultural & Landscape Touring, Gastronomy &Wine, Nature Tourism and City Breaks.

Topic 3: Booking Process | Months to Travel | Length of Stay | Travel Partners

	Trip booking?	Trip planning antecedence?	Duration of stay?	Travel frequency?	Months?	Travel partners?
I1	Internet	3 months	5 days	Every 2 months	All year long (climate influence; avoid tourist peaks)	Alone
I2	Internet	6 months	1 week	3 times a year	February, April, June, September	Wife and siblings-in-law
I3	Internet	2-3 months	1 week	3 times a year	All year around	Husband
I4	Travel Agency	2-3 months	1 week	3/4 times a year	Avoid July and August because of hot weather and school holidays	Wife
I5	Internet	2-3 months	1 week	3 times a year	All year around	Wife
I6	Travel Agency	2-3 months	1 week	3/4 times a year	February-June, September	Husband
I7	Travel Agency	6 months	2 days	Once a year	March, April	Husband
I8	Travel Agency	2 months	1 week	2 timas a year (little as possible)	Never during the summer	Wife and siblings-in-law
I9	Privetly (directly with the hotel)	2 months	3 days	2 times a year	Spring and Autumn	Friends
I10	Travel Agency	3 months	3 days (2 weeks in Portugal)	10 times a year	March, April, September, October	Husband
I11	Travel Agency	6 months	5 days	Once a year	March, April, September, October	Wife
I12	Travel Agency	1 year before	1 week	Once a year	March, April	Wife
I13	Privetly (directly with the hotel)	1 month	3 days	Every 3 months within his home country	Never during the winter	Wife and siblings-in-law
I14	Internet	1 month	1 week	4 times a year	When it is good weather	Alone

In regard of the booking process, the majority of the interviewees said the resorted to a travel agency in order to book their trip. In terms of planning antecedence of the trip, the majority said they start planning the trip 2-3 months prior. In addition, more than a half of the interviews said that they were staying in the region of Lisbon for 1 week.

When asked about what were their preferred months to travel, almost every respondent said that they only travel off hot weather seasons and the most months mentioned were March, April and September.

Finally in terms of travel companions, almost every interviewee was traveling as a couple.

Topic 4: Competitors

	Do you usually visit other European cities?
I1	Barcelona, London, Rome
I2	Paris, Rome
I3	Paris, London, Barcelona
I4	Malta and some other Mediterranean places
I5	Paris, London, Barcelona
I6	Paris, Sicily, Malta, Cyprus, Corsica
I7	London, Paris, Barcelona, Lyon
I8	Krakov, Munique, Zurich, Milan, Madrid, Paris, Genebra
I9	London, Paris, Budapest, Rome
I10	Madrid, Barcelona, Rome, Venice
I11	London, Paris, Belgium, Barcelona, Berlin, Munique, Bordeaux
I12	London, Viena, Rome, Saint Petersburg
I13	Lyon, Venice
I14	Paris, Rome

In regard of other European cities the interviewees had already been to, the responses were somewhat heterogeneous. However, Rome, London, Paris and Barcelona, where the most mentioned cities.

Topic 5: Medical Concerns

When the interviewees were asked if they have any medical concern when they travel, all of the responses were negative, i.e., none of the respondents affirm having any type of medical concern when they travel. Even though one respondent confessed to be recovering from breast cancer and other reported having Parkinson.

Topic 6: "Complaints" about the Destination

	Should Lisbon have more tourism products/infrastructures (accessibility) directed to seniors?
I1	Yes, there are a lot of steps
I2	No
I3	Yes, the public transportation is difficult to understand
I4	Yes, poor signaling but easy to get around in terms of accessibility
I5	Yes, easy to walk around but the metro is complicated
I6	Yes, the buses are hard to read
I7	Yes, it is difficult to walk around
I8	No
I9	Yes, public transportation and hotels are expensive
I10	Yes, it is difficult to walk around
I11	Yes, it is difficult to walk around ("7 hills")
I12	No
I13	No
I14	No, the costal area has improved a lot

Almost every interviewee mentioned that it is difficult to walk around and to utilize the public transportation network within the city.

❖ Section 2.3: Interviews' Scripts

Hotel/ Travel Agency Interview Script

- **Warm-up:** I am currently developing a study for my master's thesis in the tourism field about the senior segment in Europe. The purpose of this interview is to gather as much information about the behavior of this segment when it chooses Portugal as a tourist destination, from the moment when the customer books the trip until the time he leaves the tourist destination.
- **Senior segment definition:** People with 65 or more years that are probably already retired and who live a comfortable life, i.e., that have purchasing power.

Note: All questions refer to people with 65+ years and resident in Europe (except Portugal)

Hotel/ Travel Agency Interview Script

- **Opening question**: I would like for you to begin by explaining how does the interaction of this segment with the hotel works, from the booking process till the check-out moment. Then, I would also like to know how the segment behaves during the trip.

- **Topics to cover:**
- Client's contact with the agency (channel);
- Booking's antecedence;
- Client's dependence on the hotel/ agency to plan and book the trip activities;
- Contracted services through the hotel/ agency;
- Transportation;
- Type of activities/attractions;
- Motivations to come to Lisbon;
- Type of restaurants;
- Type of room/ accommodation;
- Repeat of purchase (periodicity);
- Nationalities;
- Knowledge of other idioms beyond the native.

Hotel/ Travel Agency Interview Script

- **Final Essential Questions**:
- Does the Hotel/Agency recognizes an increasing trend in the number of customers of the segment?
- Does the Hotel/ Agency makes any type of promotion specifically towards this segment?
- Which are the main competitors regarding the segment in terms of destination?
- Which are the European emerging markets regarding the segment?
- How does the segment travels: Individually (alone, couple, family, friends) or in Group Packages?
- What is the segment's average number of nights per trip?
- What are the months with the highest number of visitors regarding the segment?
- *Turismo de Portugal* promotes 10 strategic tourism products, which are the most relevant for the segment? (see Appendix 18)

- **Hotel/Agency and Interviewee profile:** I would like for you to talk about the Hotel's/Agency's profile as well as your work responsibilities

Tourist Interview Script

- Is it your first time in Portugal? How often do you come to Portugal?
- Is it your first time in Lisbon? How often do you come to Lisbon?
- Do you intend to come back? When?
- Will/Do you recommend your friends to visit Lisbon?
- What is the purpose of your visit?
- Why did you choose this destination? (motivation)
- Do you usually visit other European cities? Which ones?
- How long are you staying?
- With whom are you traveling?
- How did you book your trip? (channel)
- How early did you begin to plan your trip?
- How often do you travel?
- In what months do you usually choose to travel?
- What attractions/activities are you looking to experience while staying here?
- What are the main features that a destination has to have for you to visit it?
- Do you have medical concerns when you travel?
- Do you feel like Lisbon should have more tourism products/infrastructures (accessibility) directed to the senior segment? Examples.
- From this list of service products, what are the most important to you when you travel? (please refer to Appendix 18)

Tourist Interview Script

- **Screening Questions:**
- Where do you come form?

Note: not from Europe, <u>end the interview</u>

- How old are you and what is your occupation?

Note: if the interviewee is not retired and does not have 60+ years, <u>end the interview</u>

- In what type of accommodation are you staying in?

Note: if the interviewee answer something different from 4 or 5* hotel, <u>end the interview</u>

❖ Section 2.4: Interviews' Profile

Date	Stakeholder	Interviewee
19.02.2014	**Top Atlântico** Belongs to Espírito Santo Viagens and is one of the few agencies that still has "street shops".	**Corporate Agent** Is responsible for the management of corporate accounts.
24.02.2014	**Barceló Viagens** The agency is owned by a Spanish Group and is mainly focused in the corporate and groups segments.	**Commercial Director** Is responsible for the customers' "recrutment" and relationships.
16.04.2014	**Lusonova** 55-year old agency that is mainly focused in the corporate and groups segments and to capture new incoming markets. The agency has a wide range of products to offer, including their own tour circuits in Portugal and also along Europe.	**Incoming Agent** Is responsible for the management of incoming accounts.
17.04.2014	**Citur** The agency is a Destination Management Company (DMC) with few activity in the Foreign Independent Tour (FIT) segment and which is focused in working the goups and Meetings and Incentives (MI) segments and also to capture new incoming markets.	**DMC Groups Director** Is responsible for project coordination and promotion in selected markets.
07.05.2014	**Espírito Santo Viagens** It is a B2B Destination Management Company owned by a Portuguese Group that is mainly focused in MI and groups.	**Executive Committee Vice Chairman (ATL's Deputy President)** Is responsible for the MI area (Is involved in the development of the ATL's activities and budget plans).
07.05.2014	**Mr. Travel** It is mainly focused in FIT leisure trips and directed to upmarket clients since most of its partners are 5* hotels and similar kind of services.	**Owner & General Manager** Besides the duties as owner and general manager it also has a direct involvment in the sales and marketing areas.

Date	Stakeholder	Interviewee
25.02.2014	**Ritz Four Seasons Hotel (5*)** 53-year Hotel that is an icone in the city of Lisbon (listed as a monument of national interest). It is part of a very notorious international hotel chain being the preferred hotel to receive international State figures.	**Director of Rooms** Is part of the executive committee and rensponsible for the areas of housekeeping, reception, reservations, concierge and lobby, maintenance, spa and fitness.
28.03.2014	**Tiara Park Atlantic Lisboa (5*)** 29-year old Hotel that is focused in the corporate market, medieum-sized groups (cruise groups) and city breaks.	**Rooms Division Director** Is responsible for all front office area, parking, laundry, minibar, phone, lobby and computers.
01.04.2014	**Hotel Palácio Estoril (5*)** Very Classic Hotel that specially focuses in its regular clients and to provide a high quality personalized service.	**Director of Sales & Marketing** Is responsible for the marketing and sales plan and also for the USA, UK, France and Scandinavia markets.
02.04.2014	**Grande Real Villa Itália Hotel & Spa (5*)** 7-year old Hotel that is the main Hotel of a Portuguese Hotel Group and is part of the Leading Hotels of the World Branding.	**Front Office Manager** Is responsible for all the front office area and also to coordinate the relationship with the housekeeping, F&B and Spa area.
03.04.2014	**Altis Avenida Hotel (5*)** 4-year old city Boutique Hotel that belongs to the Altis Hotels Group and is located in one of the most priviledge areas of the City of Lisbon.	**Hotel Manager Assistant** Is responsible for the back and front office areas and to guarantee a personalized customer service.
08.04.2014	**Penha Longa Resort (5*)** 20-year old Hotel currently being managed by The Ritz Carlton. It is located in *Serra de Sintra and* has some of the best restaurants of the country.	**Front Office Manager Assistant** Is responsible for all front office area and also the relationship with customers.
11.04.2014	**Hotel Vinci Baixa (4*)** 5-year old city break Hotel that belongs to a Spanish Hotel chain. It is situated in the downtown area of the city of Lisbon and is mostly sought by people who want to know the heart of the city.	**First Line Receptionist** Is responsible for the customer service and the management of reservations.
15.04.2014	**Hotel Marquês de Pombal (4*)** 14-year old Hotel focused on the corporate tourism. During the summer months the hotel receives mainly leisure tourism. It is situated in Lisbon's main Avenue.	**Sales Assistant** Is responsible for the reservation of individual guests (individual,couples, friends)
02.05.2014	**Hotel Memmo Alfama (4*)** It is a newly opened Hotel with little less than a year that belongs to a Portugues Hotel Group that has a chameleonic spirit and a the concept to promote experiences that will stay in guests' memory.	**Hotel Director & Group's Operational Director** Is responsible for the company's P&L; to manage the Memmo Alfama Hotel and supervising the operation of the hotel on the day-to-day.

Tourists						
Date	**Location**	**Gender**	**Nationality**	**Occupation**	**Age**	
14.04.14	*Baixa-Chiado*	Female	German	Retired	64	I1
14.04.14	*Belém*	Male	English	Retired	65	I2
14.04.14	*Baixa-Chiado*	Female	German	Retired	66	I3
14.04.14	*Belém*	Male	German	Retired	67	I4
14.04.14	*Belém*	Male	English	Retired	67	I5
14.04.14	*Baixa-Chiado*	Female	English	Retired	68	I6
14.04.14	*Baixa-Chiado*	Female	German	Retired	68	I7
14.04.14	*Baixa-Chiado*	Male	Irish	Retired	69	I8
14.04.14	*Belém*	Male	Spanish	Retired	70	I9
14.04.14	*Belém*	Female	German	Retired	71	I10
14.04.14	*Belém*	Male	German	Retired	72	I11
14.04.14	*Belém*	Male	German	Retired	72	I12
14.04.14	*Belém*	Male	English	Retired	74	I13
14.04.14	*Belém*	Male	Spanish	Retired	76	I14

Note: all the interviewees were staying at 4 and 5-star hotels.